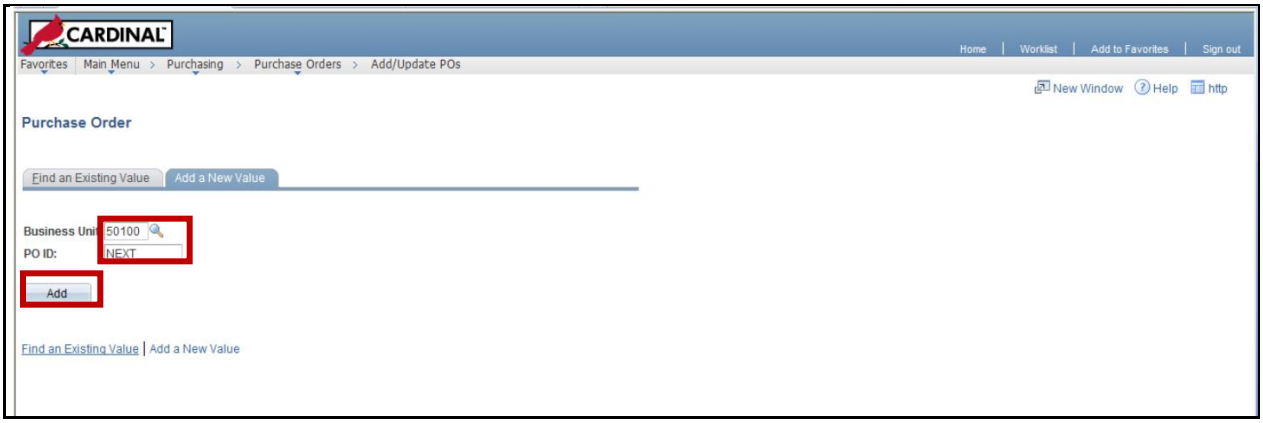
**About Professional Services Purchase Orders:**
Cardinal tracks all vendor expenditures against contracts using the Purchase Order. As a means to manage contract activities, to include TASK ORDERS, the Purchase Order is the system tool for easy reference and reporting. Purchase Orders are sent electronically (through eVA) to the vendor to confirm orders. As changes are made, confirmation orders will also be automatically sent. Those individuals with the approved role(s) will be able to add and/or update POs as necessary. The following represents a typical scenario used to create a Purchase Order and to add a Task Order related to a contract.

**ENTERING A NEW PURCHASE ORDER:** Pages 1-14

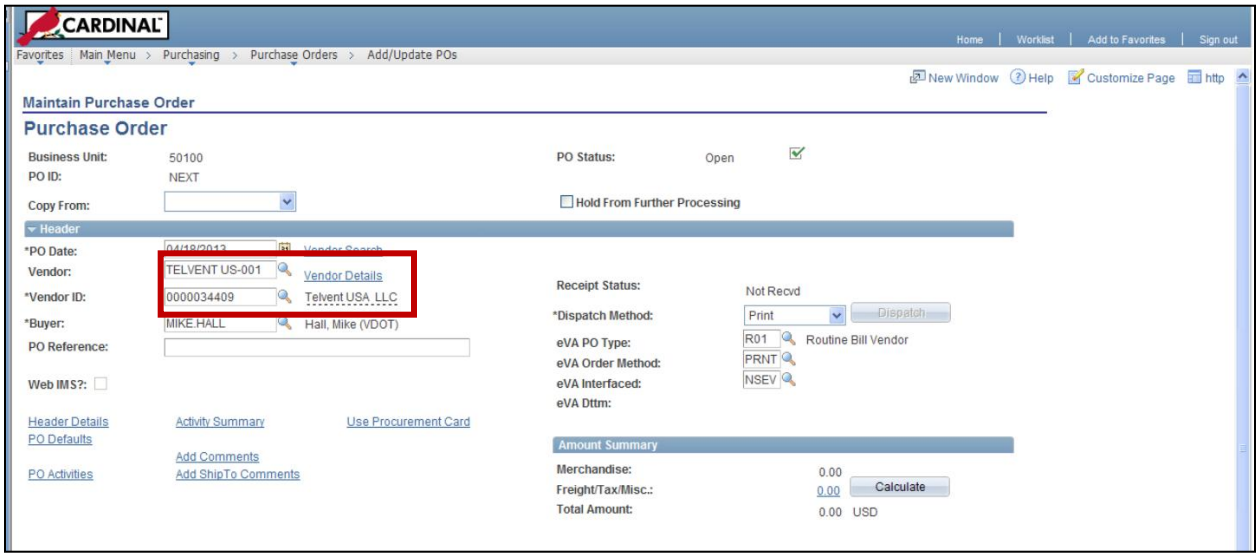
**MANAGING TASK ORDERS:** Pages 15-29

## ENTERING A NEW PURCHASE ORDER:

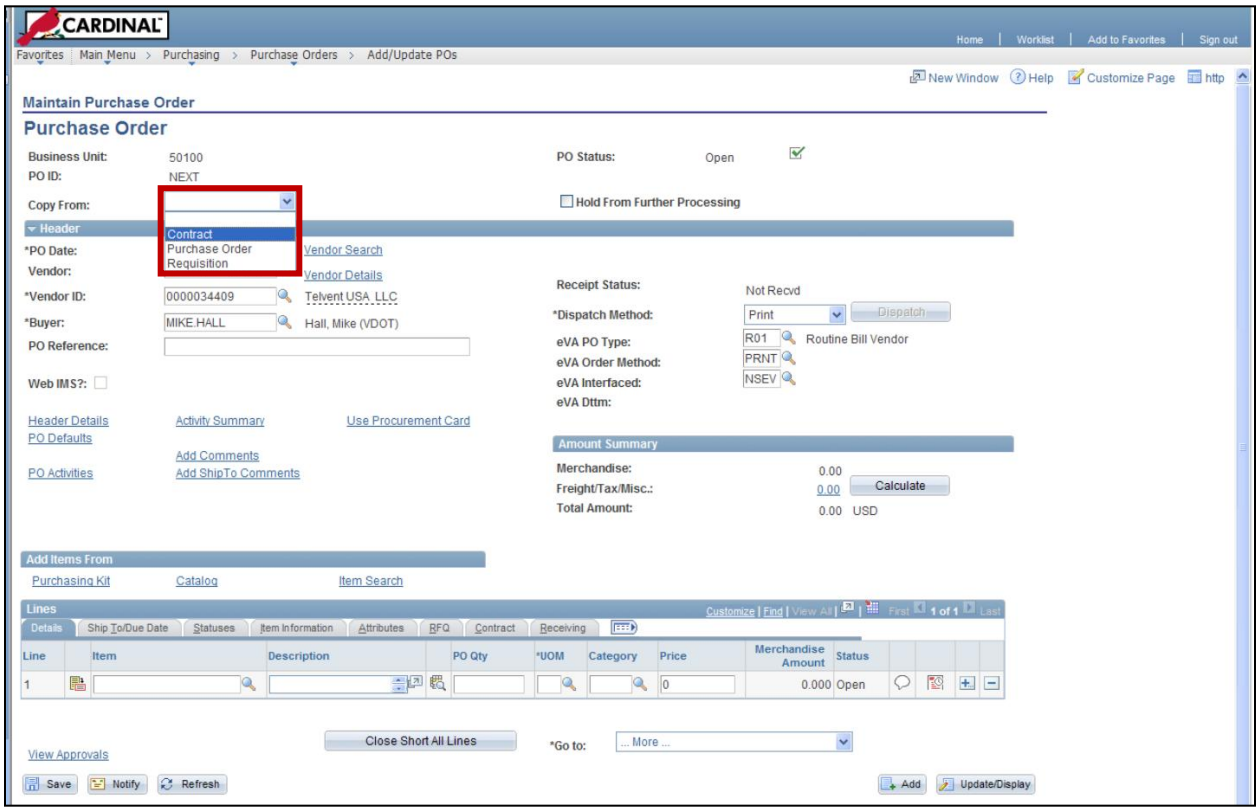
**Note: Typically, you would only create 1 Purchase Order per Contract.**



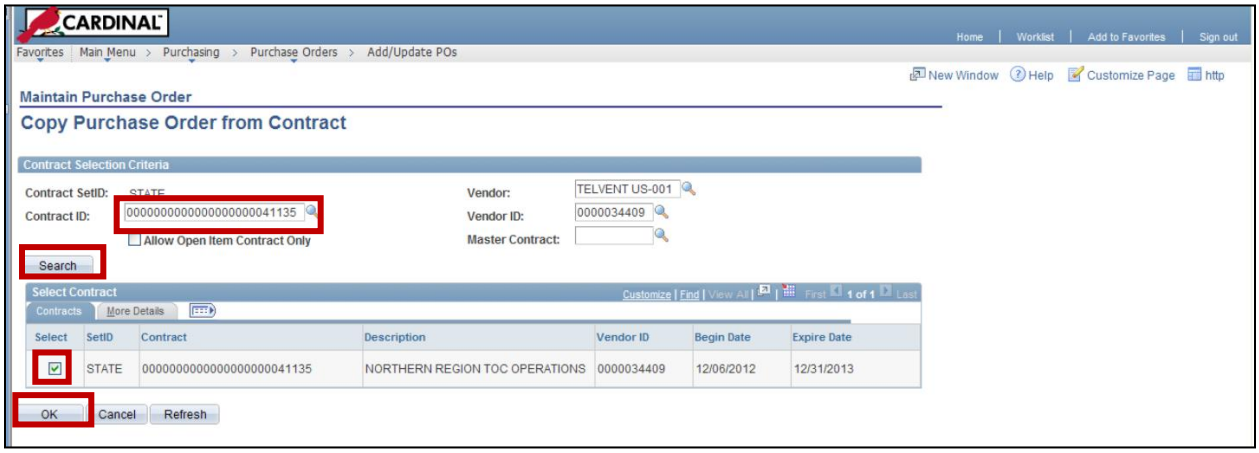

1. Navigate: **Main Menu > Purchasing > Purchase Orders > Add/Update Pos.**
2. Select **Add a New Value** tab.
3. Business Unit defaults to **50100**, PO ID defaults to **NEXT.** DO NOT change the default values.
4. Click **Add** button.




**5** Enter the vendor by **Vendor** (name) or **Vendor ID** for your contract.

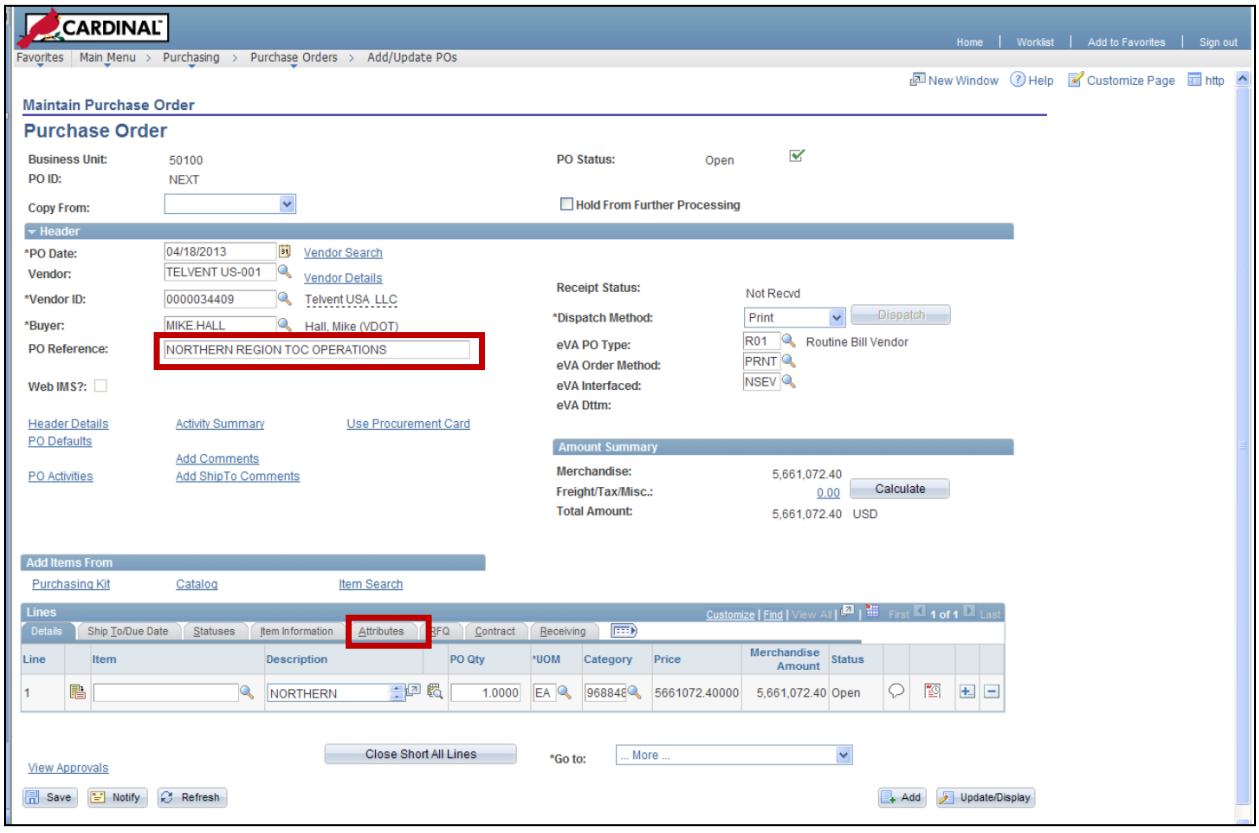



**6** Select **Contract** from the **Copy From** field.




**7** Enter **Contract ID** and Click on **Search** button.

**8** Select contract check box and click **OK.**

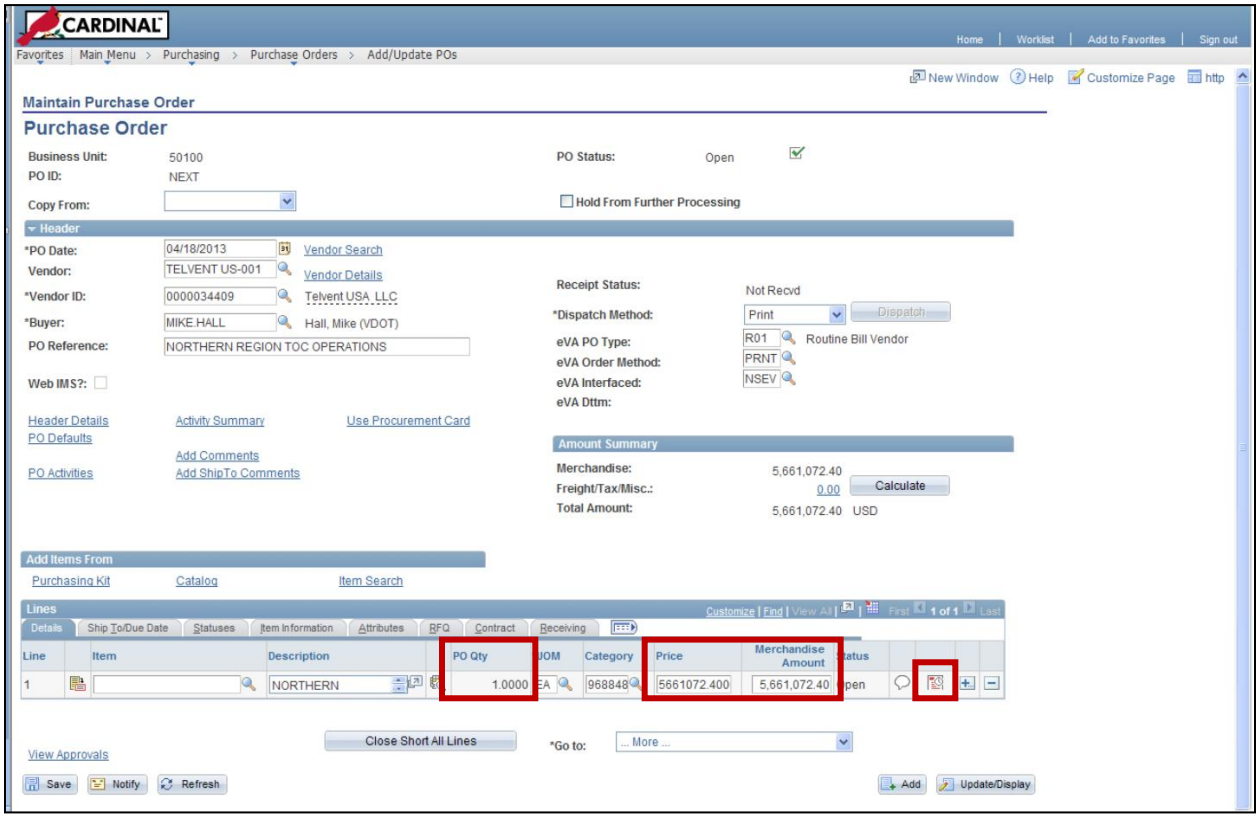



**9** Purchase Order is updated and shows contract and line data.

**10** Click on the **Attributes** tab.

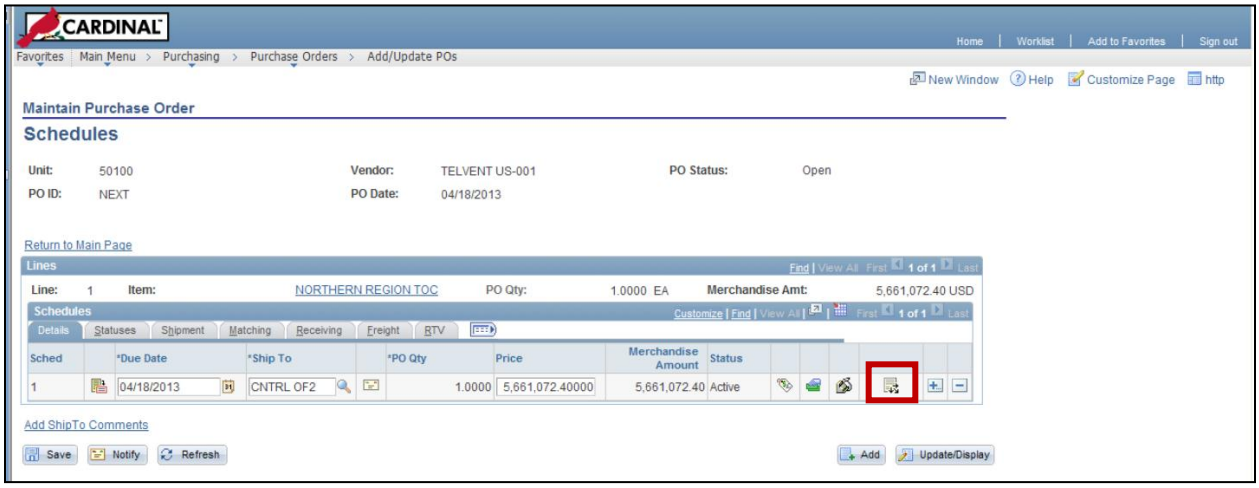
**11** Check the **Amount Only** check box.

**12** Click on the **Details** tab.



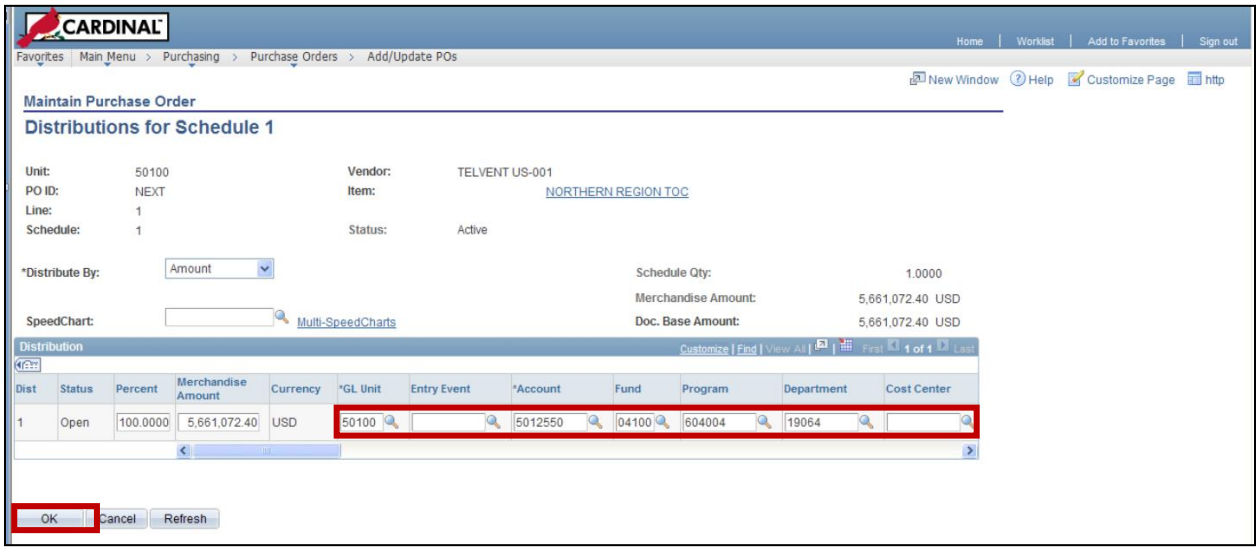

**13** PO Qty locks down to a value of 1. Enter or adjust **Price** to match the contract value.

**14** Click on the Schedule icon.



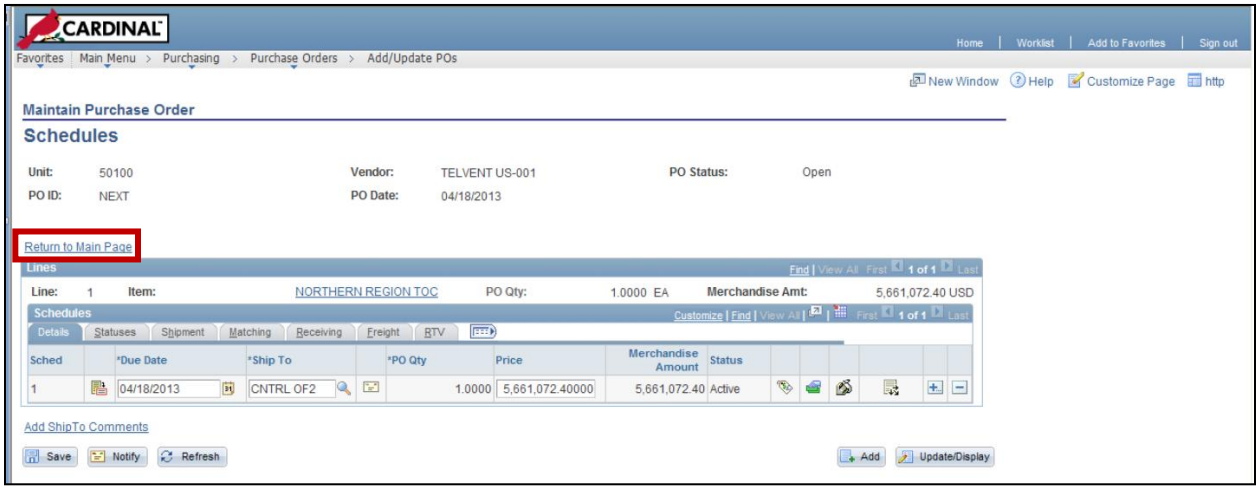

**15** Values are defaulted in as shown. Change as necessary.

**16** Click on the Distribution icon.

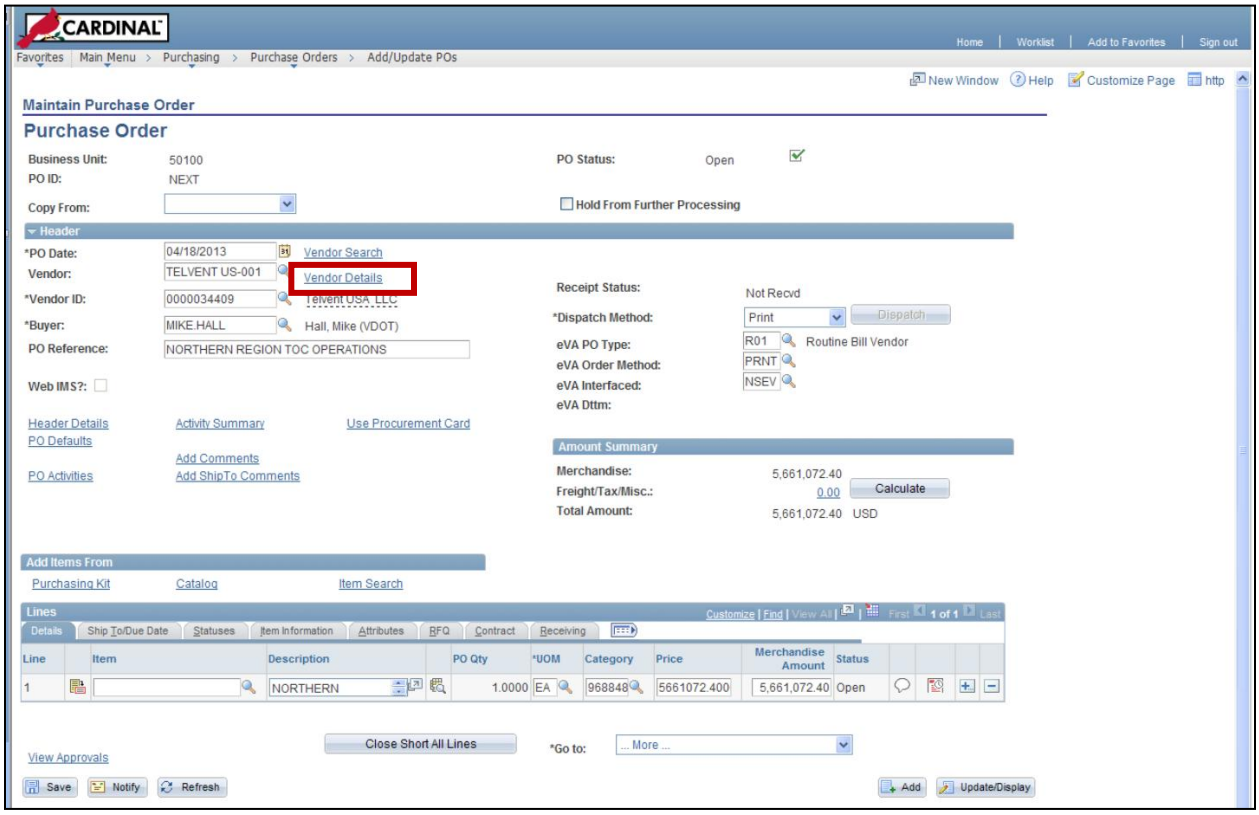



**17** Enter a valid Chart of Accounts. In this case, you might enter an Administrative Overhead charge since this is not project specific at this time.

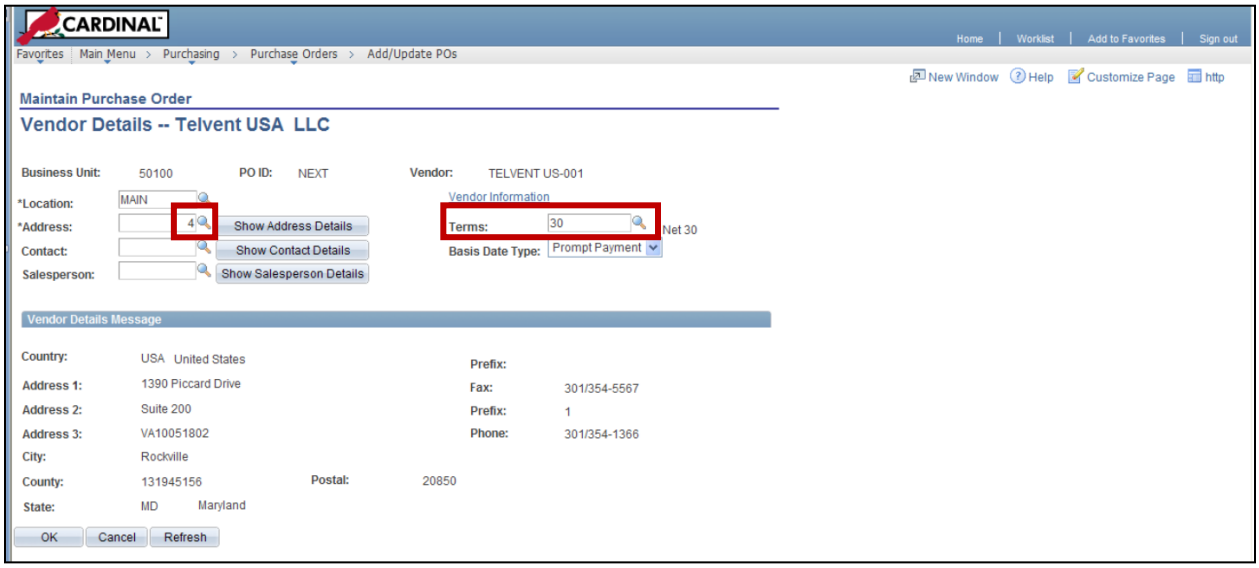
**18** Click **OK**.




**19** Click **Return to Main Page** hyperlink.

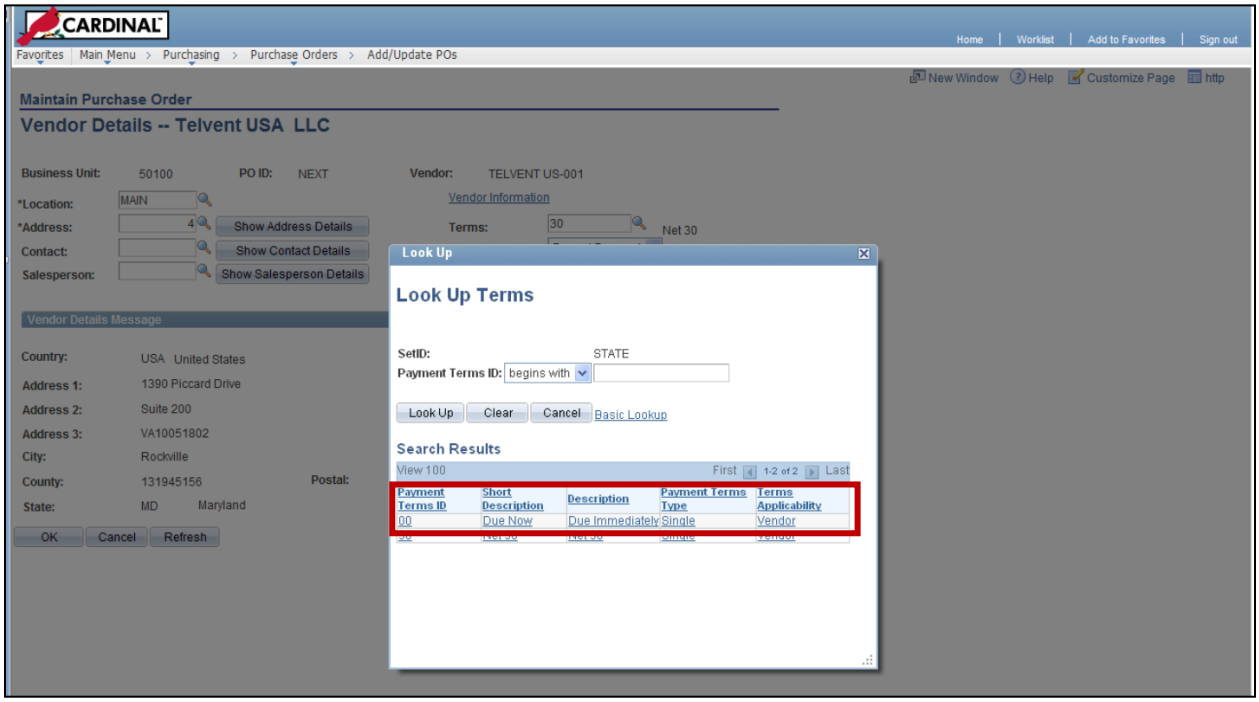



**20** Click on the **Vendor Details** hyperlink.

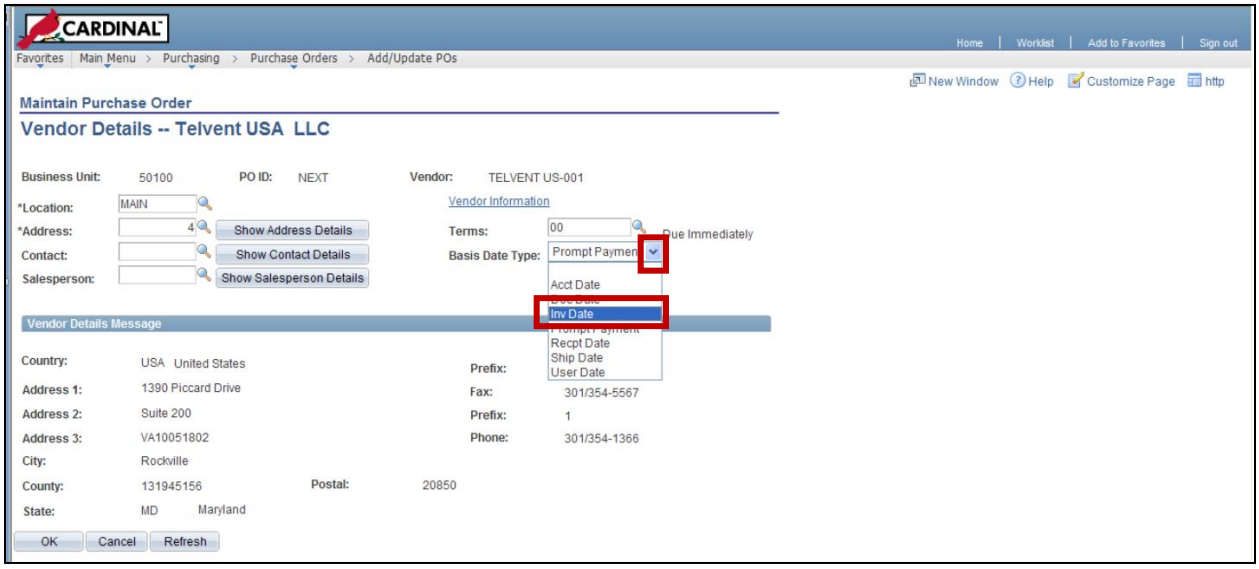



**21** Vendor Details are displayed as shown. Verify the selected **Address** is accurate or change as necessary.

**22** Click on **Terms** lookup icon.

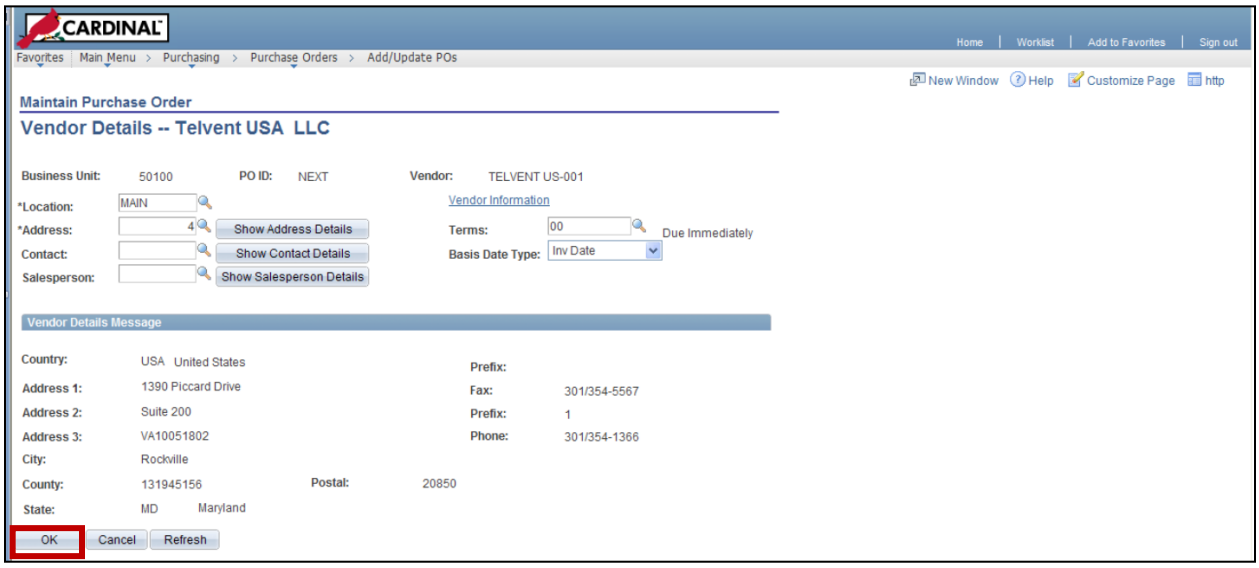



**23** Select **00 Due Immediately** Payment Term

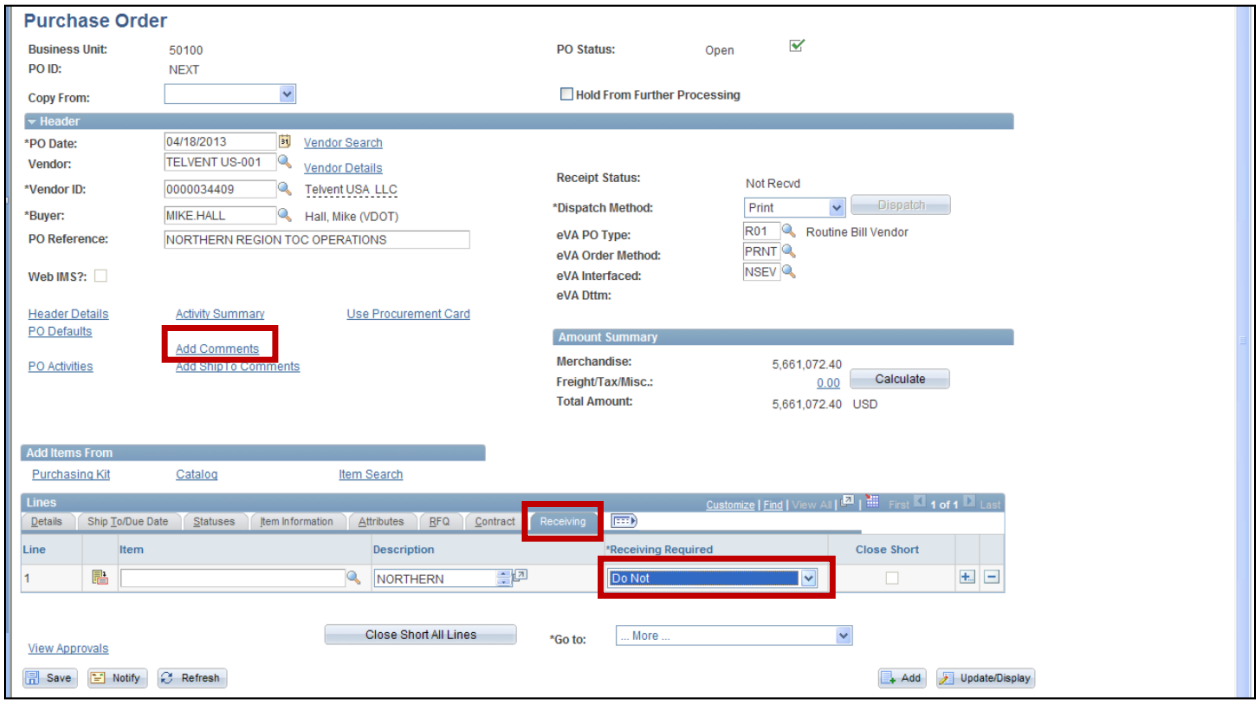



**24** Click on the **Basis Date Type** dropdown.

**25** Select **Inv Date** from the list.



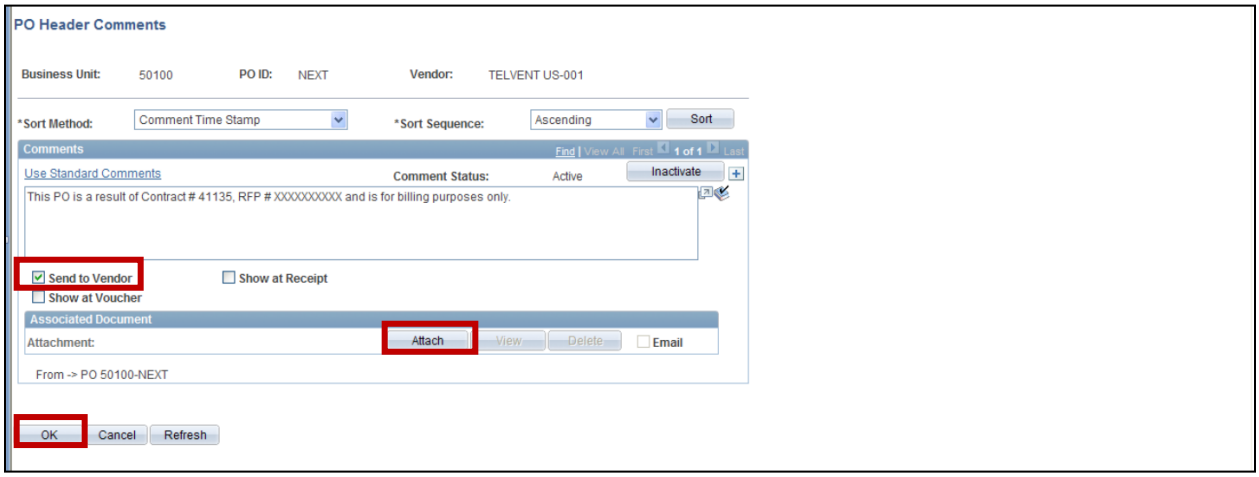

**26** Click **OK.**




**27** Click on **Receiving** tab.

**28** Enter **Do Not** as shown.

**29** Click on **Add Comments** hyperlink.

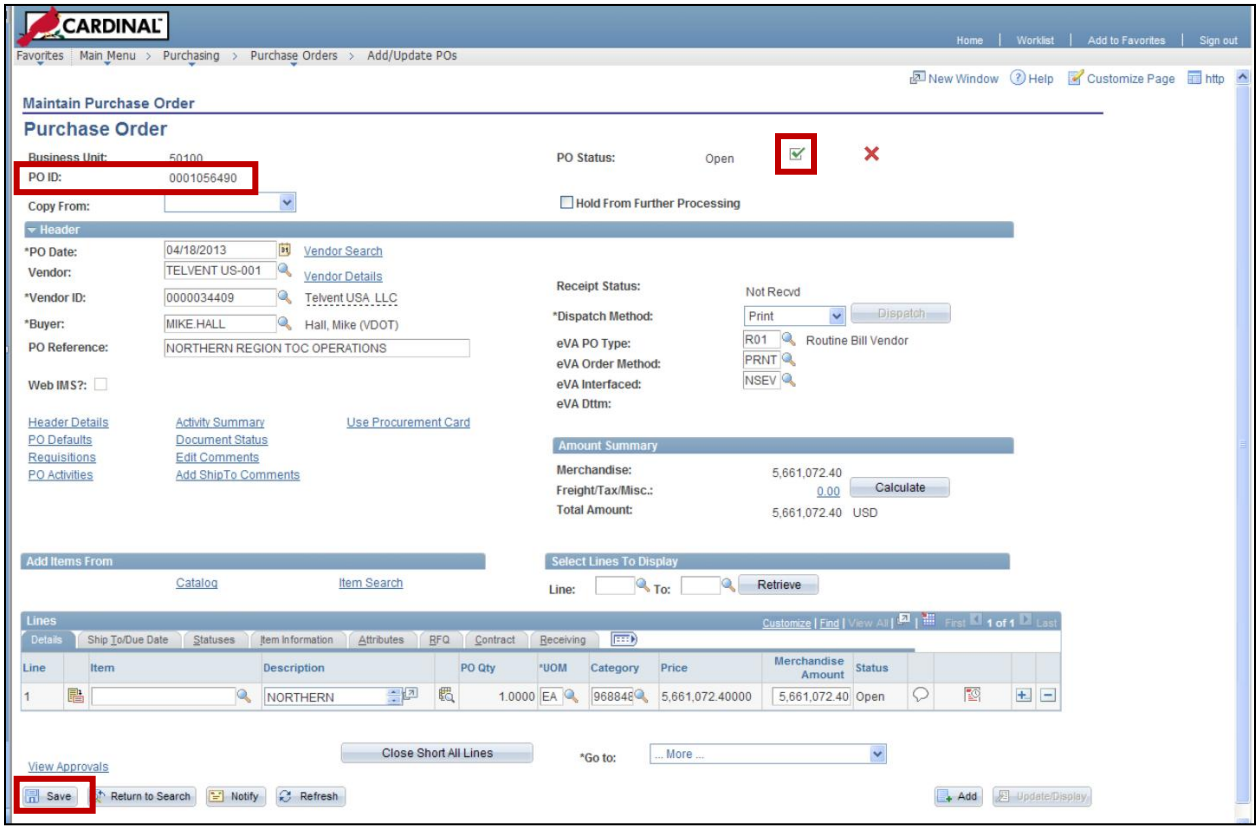



**30** Enter comments as applicable (Example shown).

**31** Check **Send To Vendor** box, if comment is to show on the PO.

**32** Click **Attach** box if you wish to attach files to the PO. Example(s): RFP, 2-Party Agreement, etc.

**33** Click **OK**.



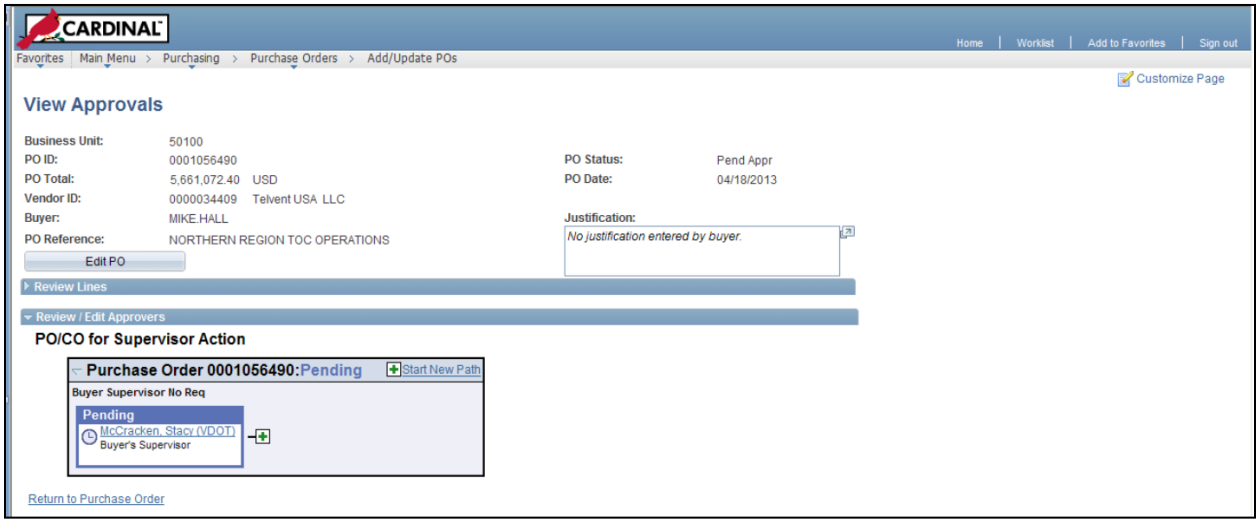

**34** Click on the **Save** button.

**35** Once the PO is saved and **PO ID** # is displayed.

**36** **PO Status** is Open and ready for approval.

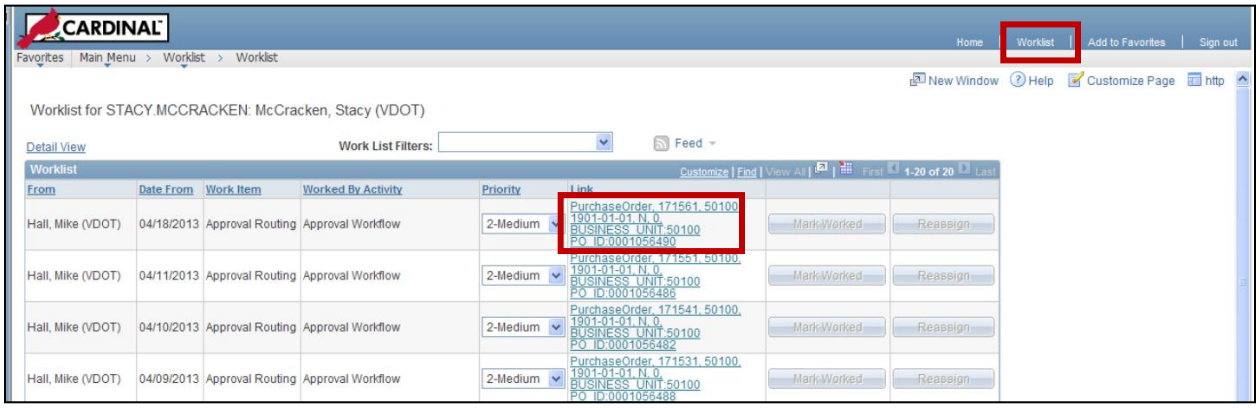
**37** Click on the Green checkmark to send forward for approval.

**38** Click on **View Approval**s hyperlink – to see who the PO went to for approval.



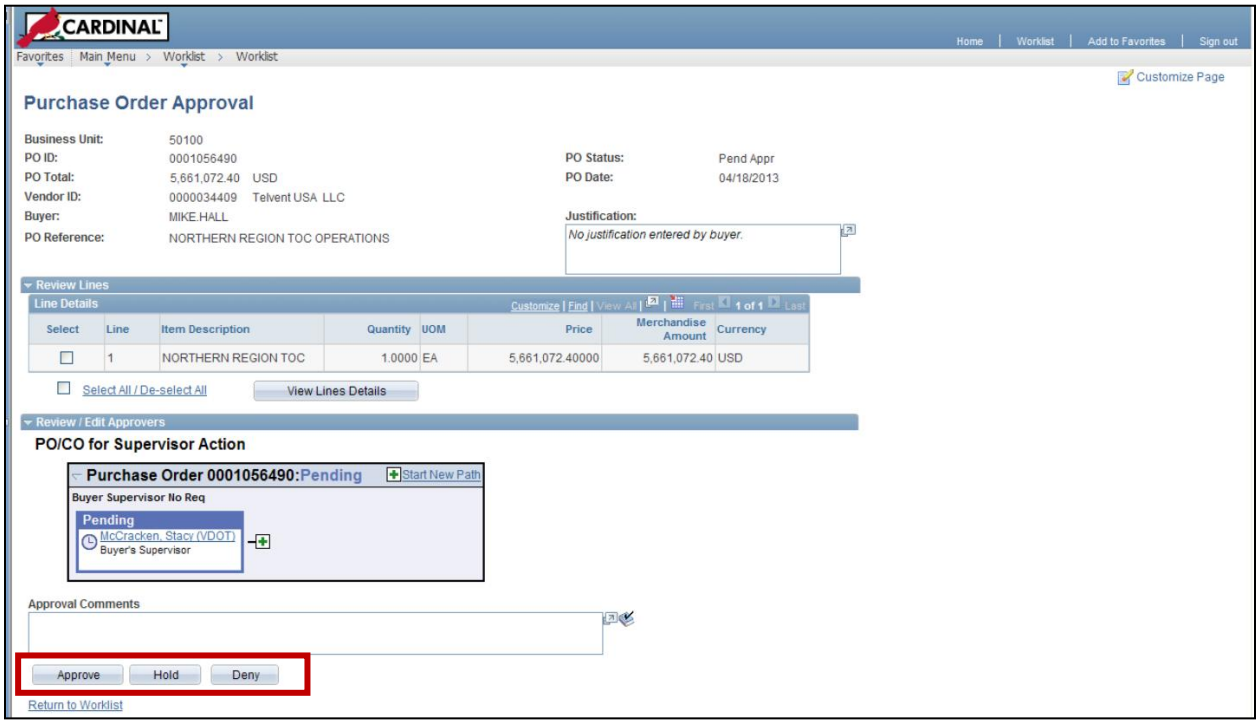

**39** PO routes to your Supervisor for approval.

**40** Supervisor receives an email with notification that a PO requires their attention.



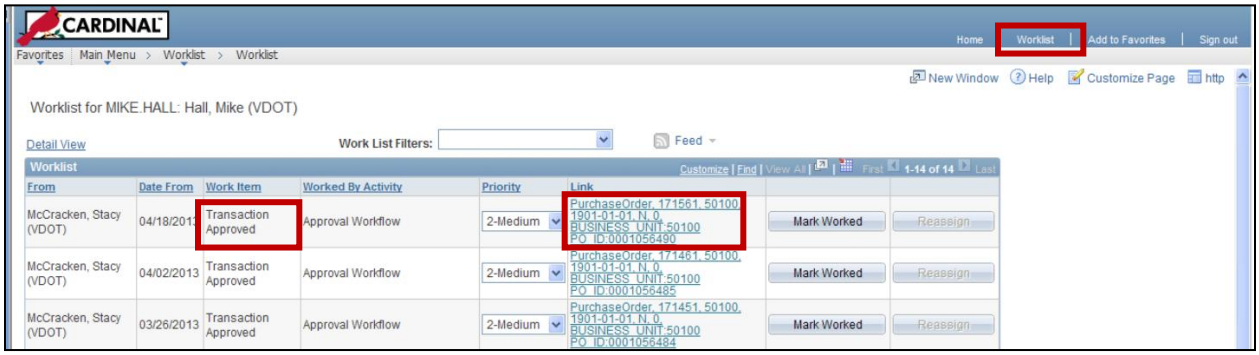

**41** Supervisor clicks on the Worklist.

**42** Supervisor clicks on item hyperlink, which opens the Purchase Order for action.




**43** Supervisor enters approval comments (if applicable).

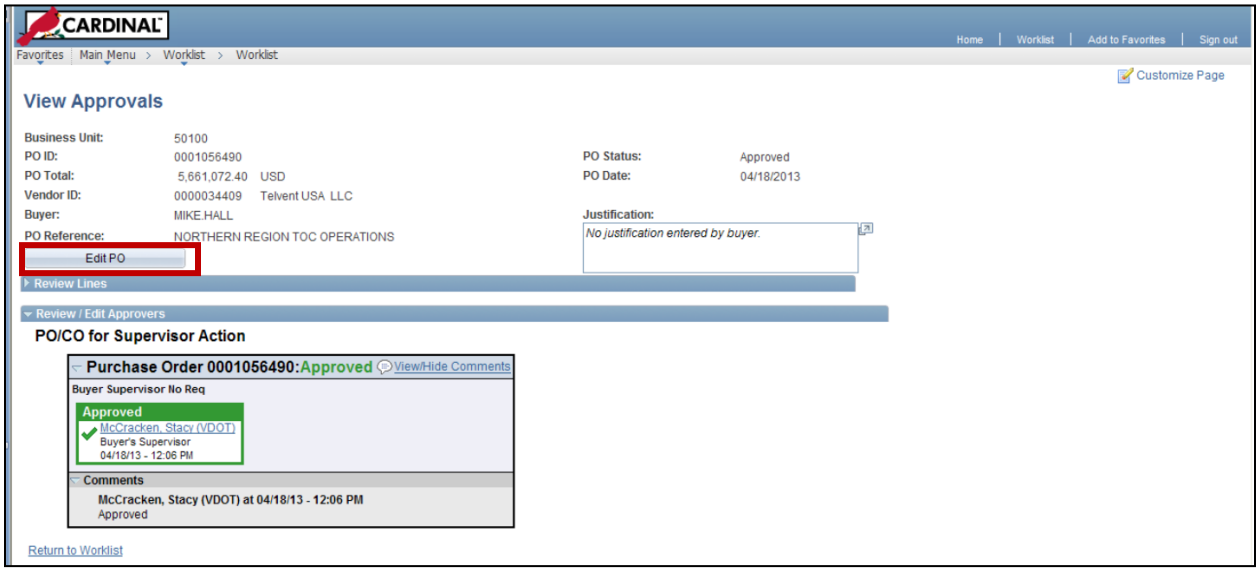
**44** Supervisor may **Approve, Hold** or **Deny** by clicking on the selected button.



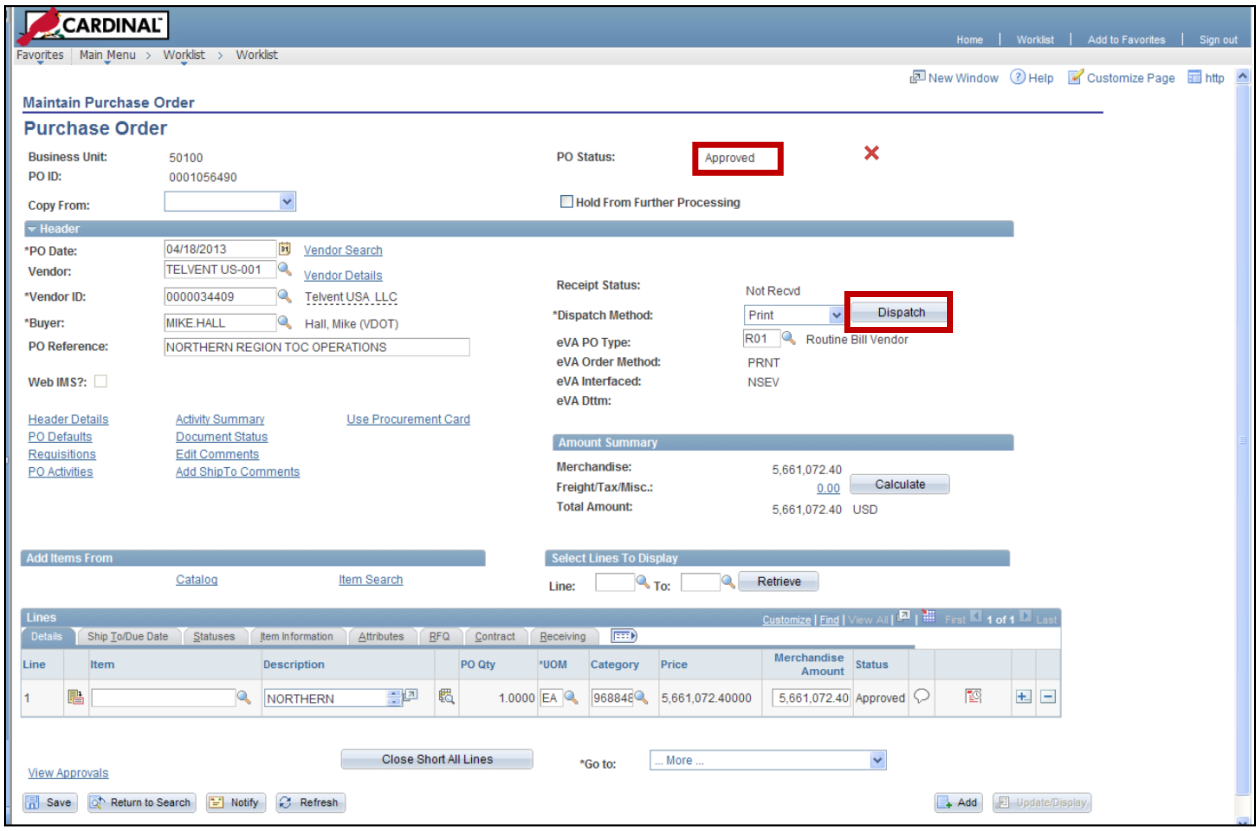

**45** Buyer receives email with notification of specific action (Approval, Hold or Denial).

**46** Buyer clicks on the **Worklist.**

**47** Click on item hyperlink.

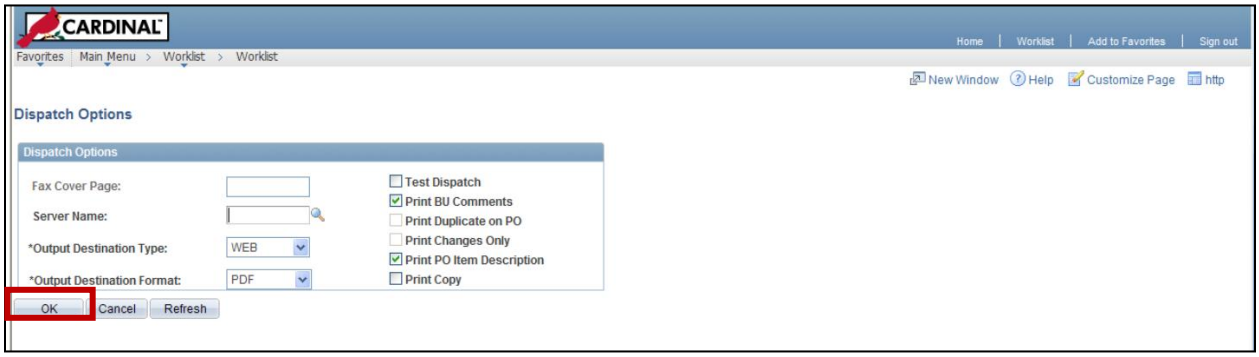



**48** Click on **Edit PO** button.

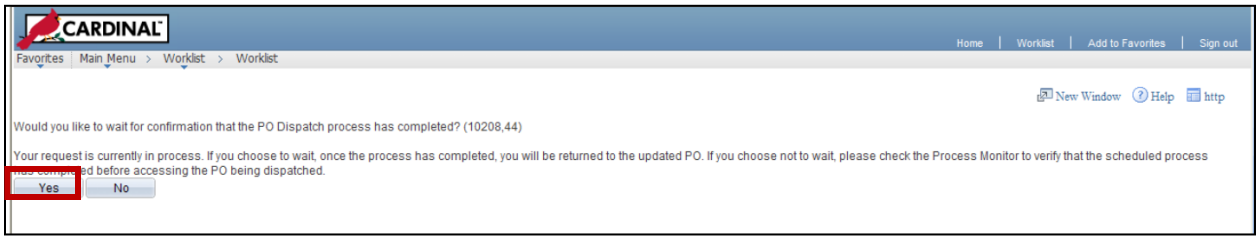



**49** PO is displayed and shows **PO Status** of **Approved**.

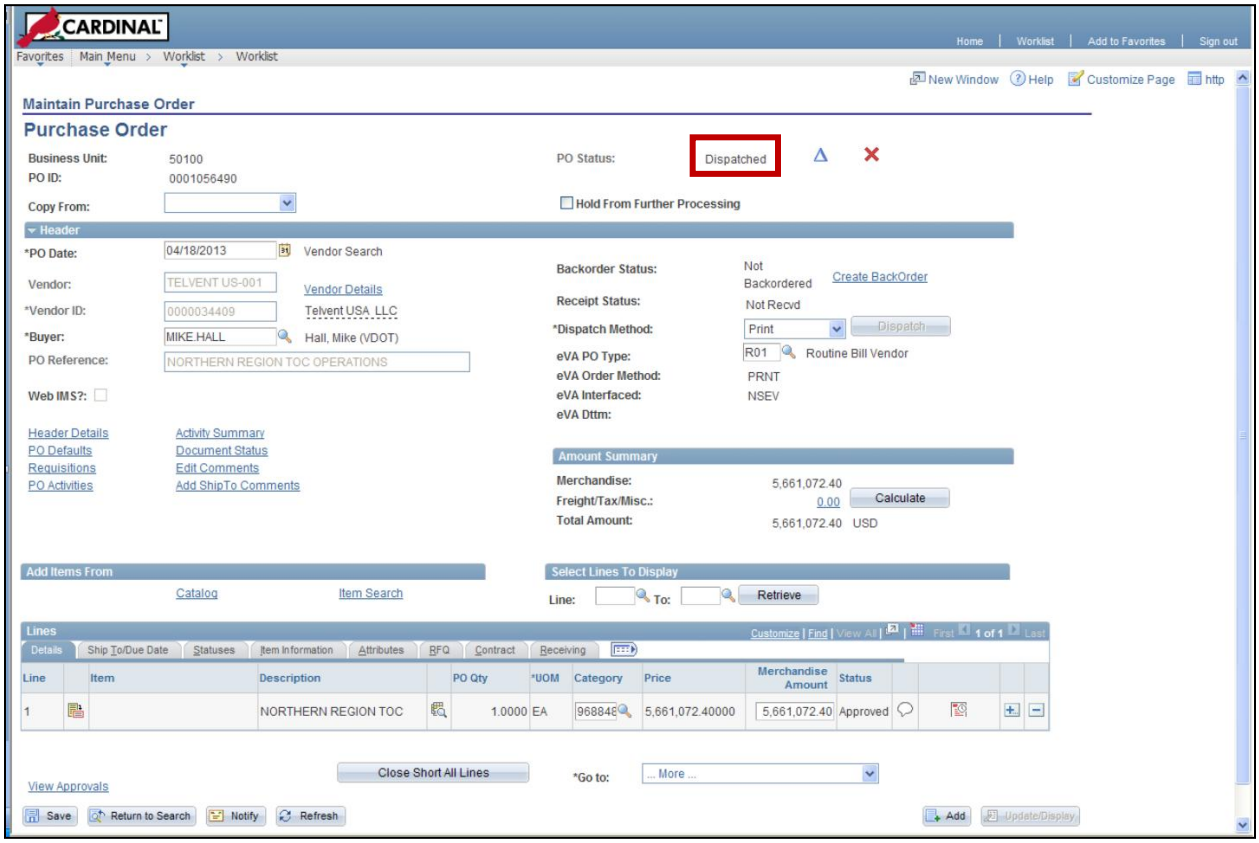
**50** Click on **Dispatch** button.




**51** Click **OK**.



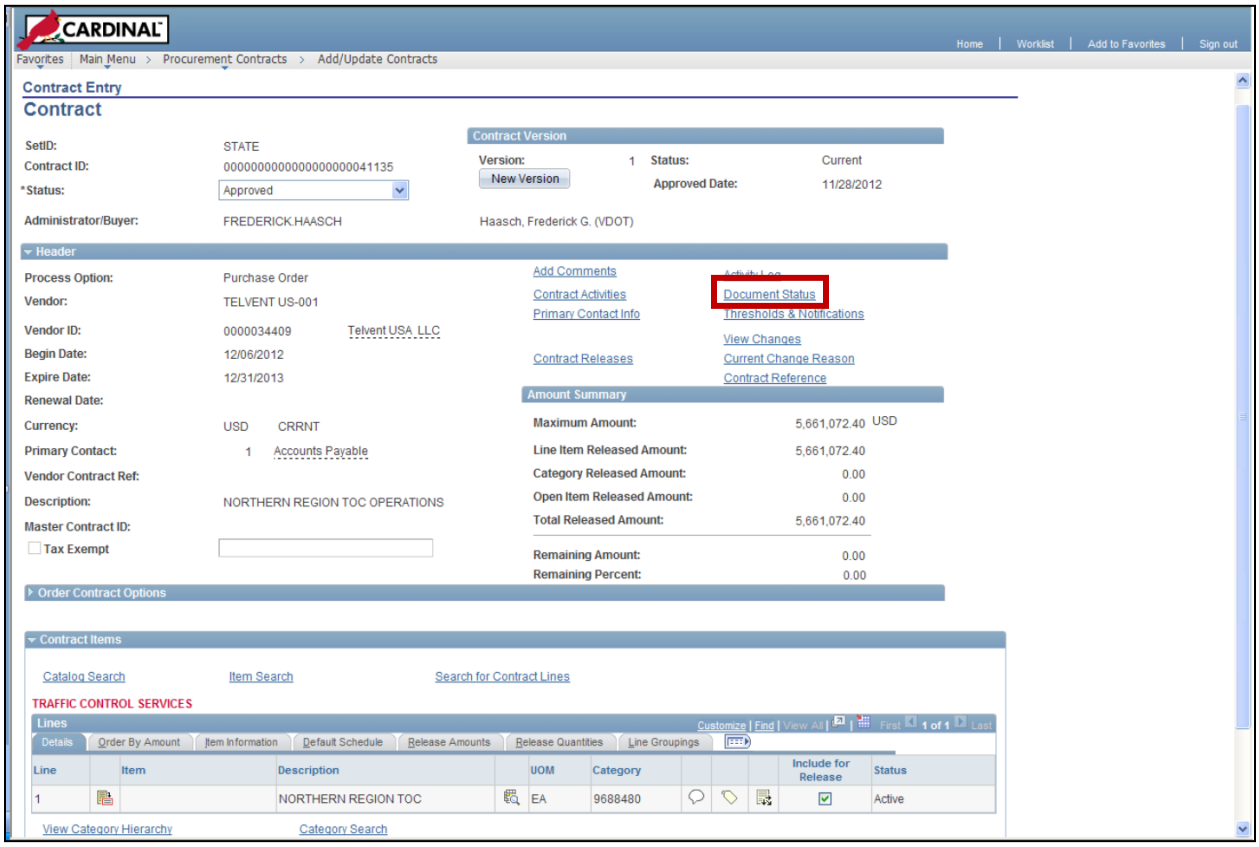

**52** Click **Yes.**




**53** Once the Purchase Order is **Dispatched,** the PO is **completed** and ready to accept Vouchers.

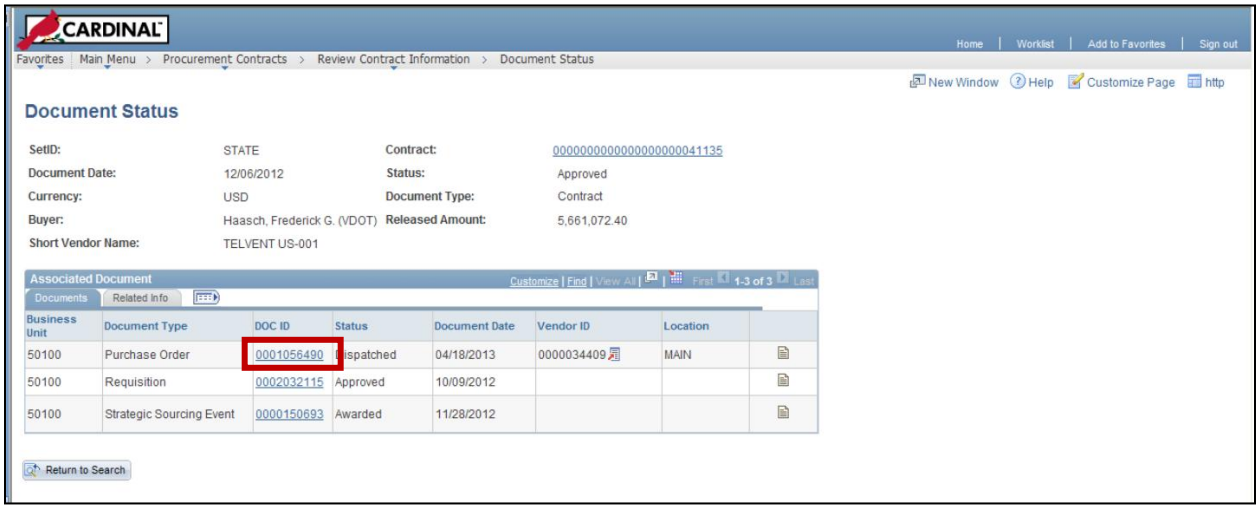
## MANAGING TASK ORDERS

**Note: Typically, the Purchase Order is your principal tracking document and represents all activity related to the contract. Line 1 of the PO should represent the entire value of the contract. Each subsequent line should represent a Task Order executed against the contract.**




**54** Typical Professional Services type contract in Cardinal as shown.

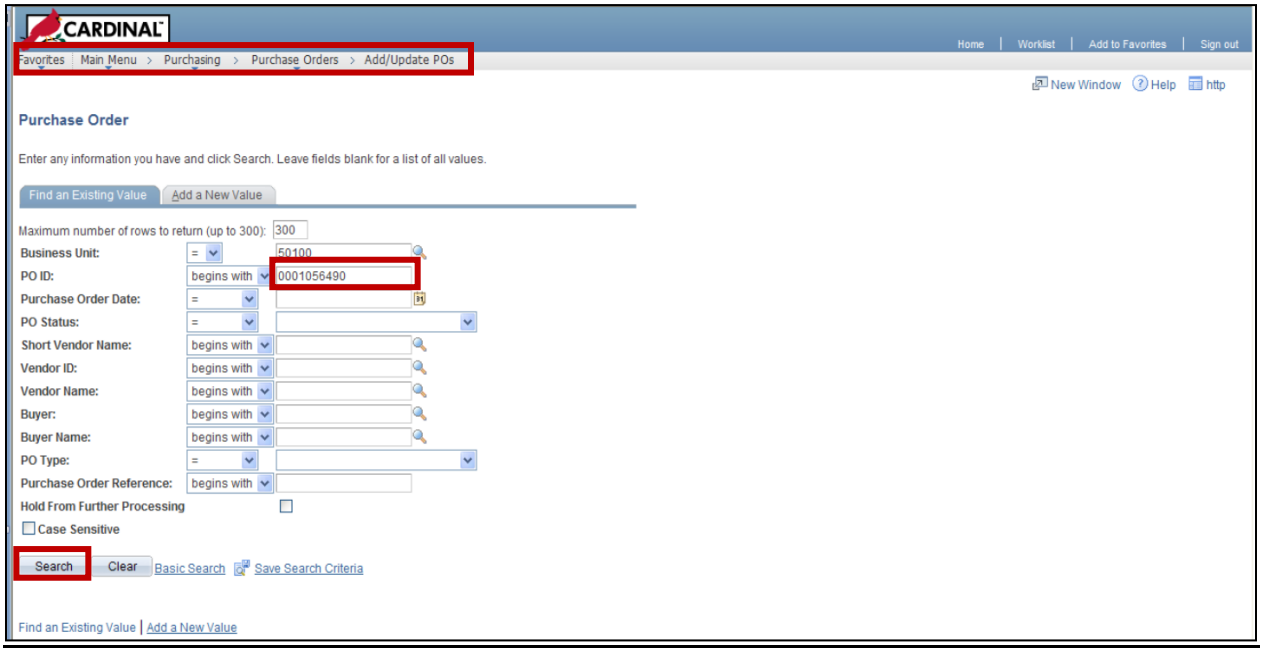
**55** Click on **Document Status** hyperlink.




**56** Related Documents to that contract are displayed.

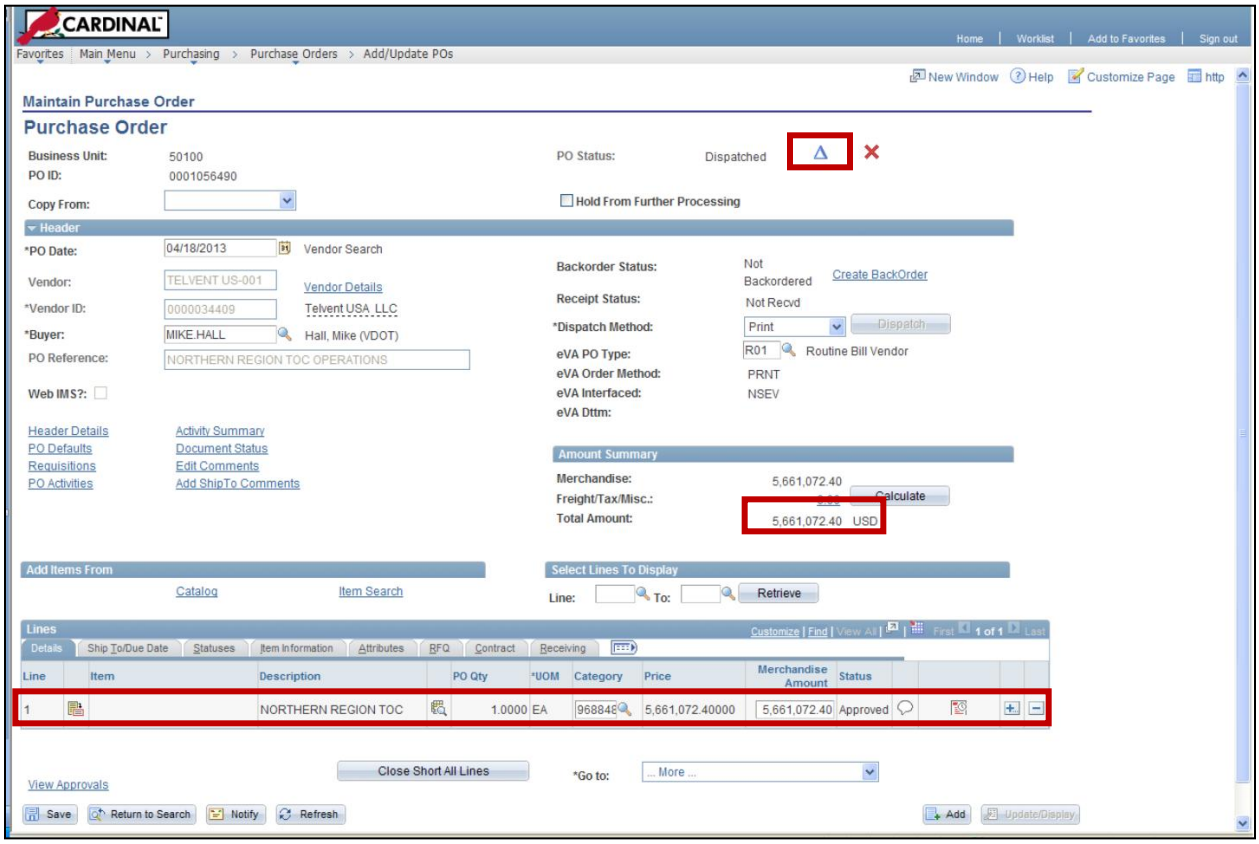
**57** You may click on any hyperlink to view/inquire document details. **Note: PO ID** # shown.

**Update PO and add a Task Order as follows:**



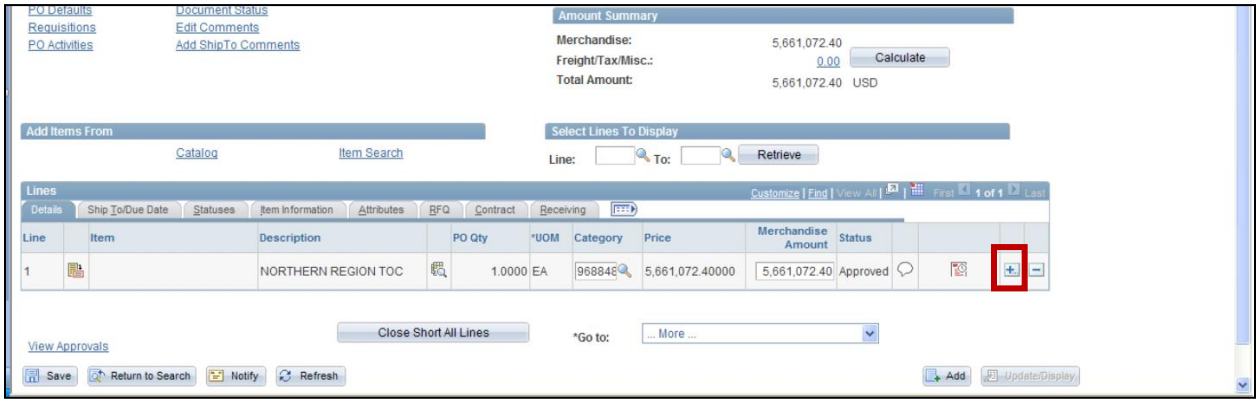

**58** Navigate as shown and enter PO ID.

**59** Click on **Search** button.

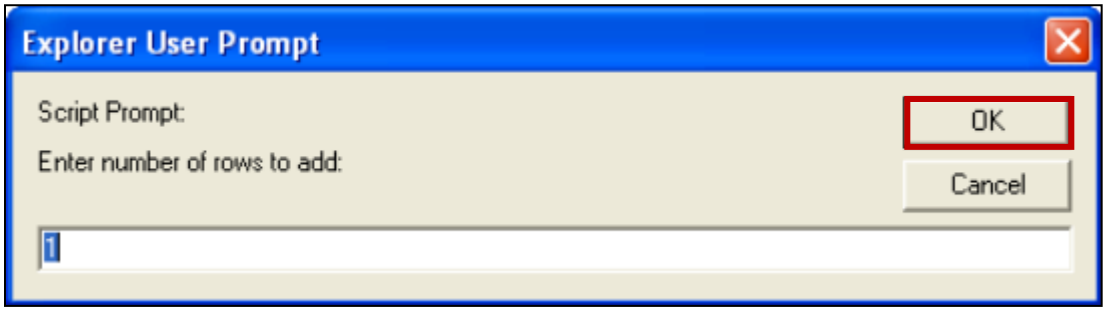



**60** PO is displayed as shown and matches contract value with one line only.

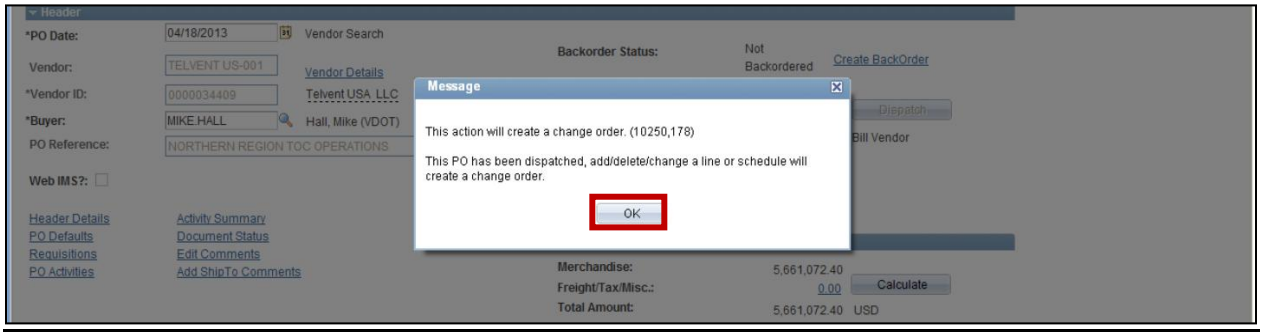
**61** Click on Change Order icon.




**62** Click on **plus+** sign to add a row.

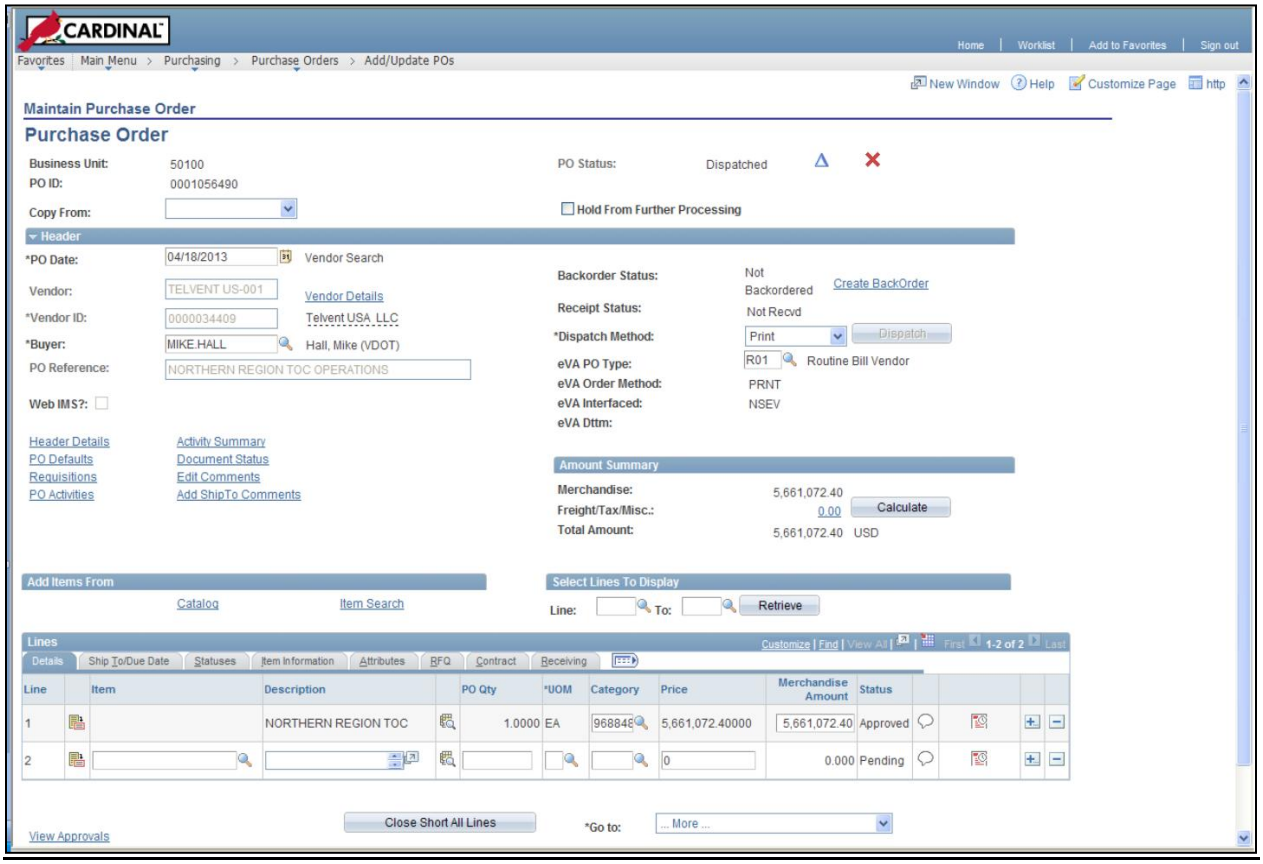



**63** Select quantity of rows to be created and click **OK**.

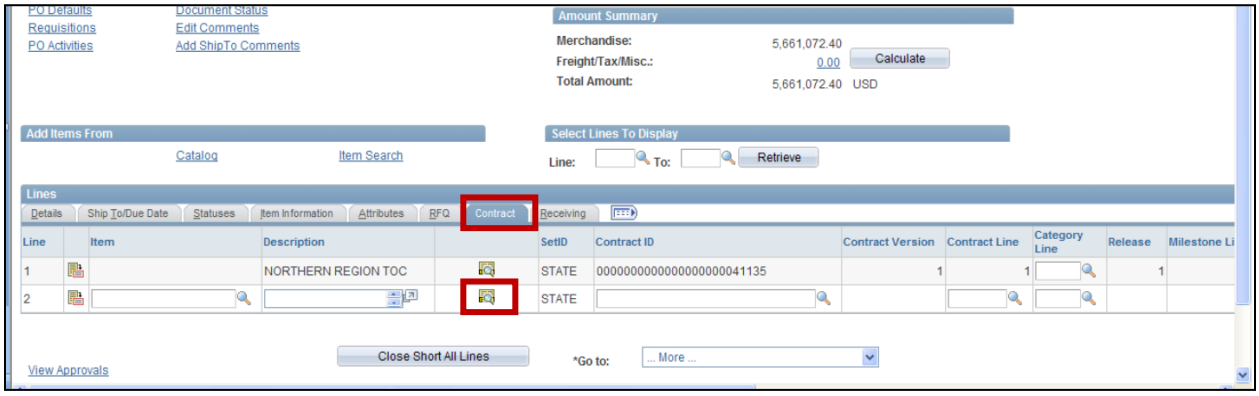



**64** Message is displayed as shown.

**65** Click **OK**.

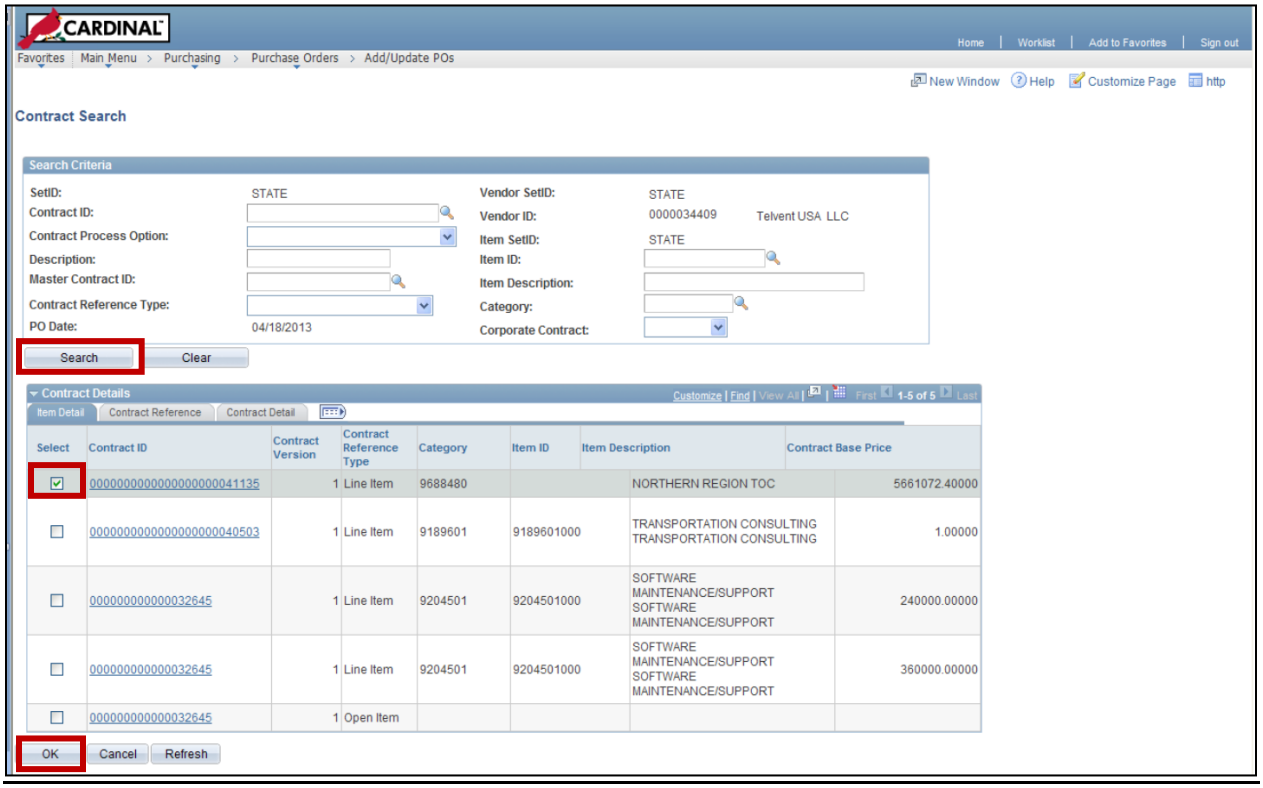



2nd line is shown and available for insertion of values.



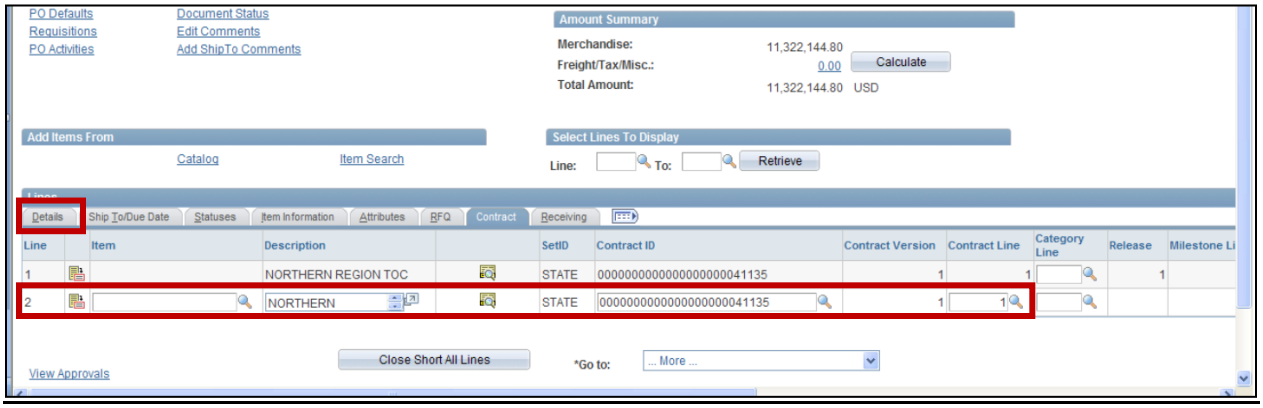

**66** Click on **Contract** tab.

**67** Click on Contract Search icon.



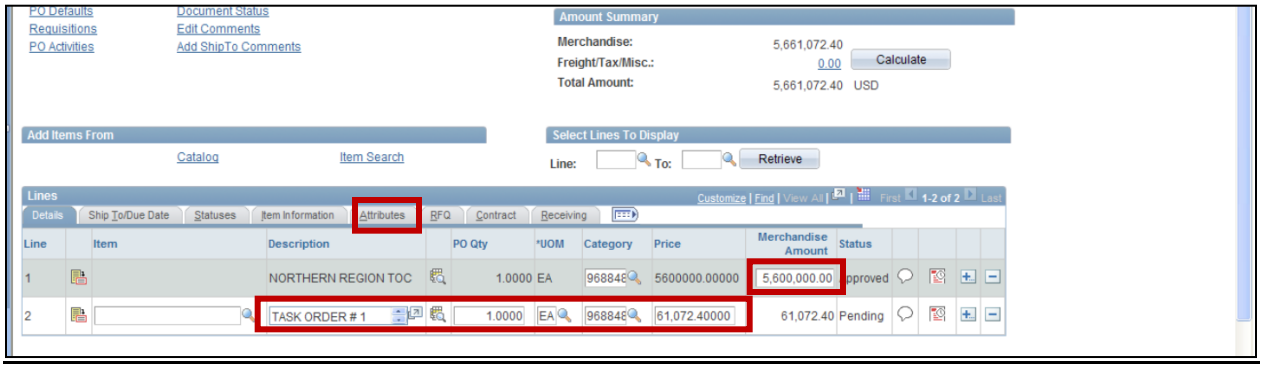

**68** Click the **Search** Button.

**69** Select the contract/line and click **OK**.




**70** **Contract ID**, **Description** and **Contract Line** # default into the line.

**71** Click the **Details** tab.

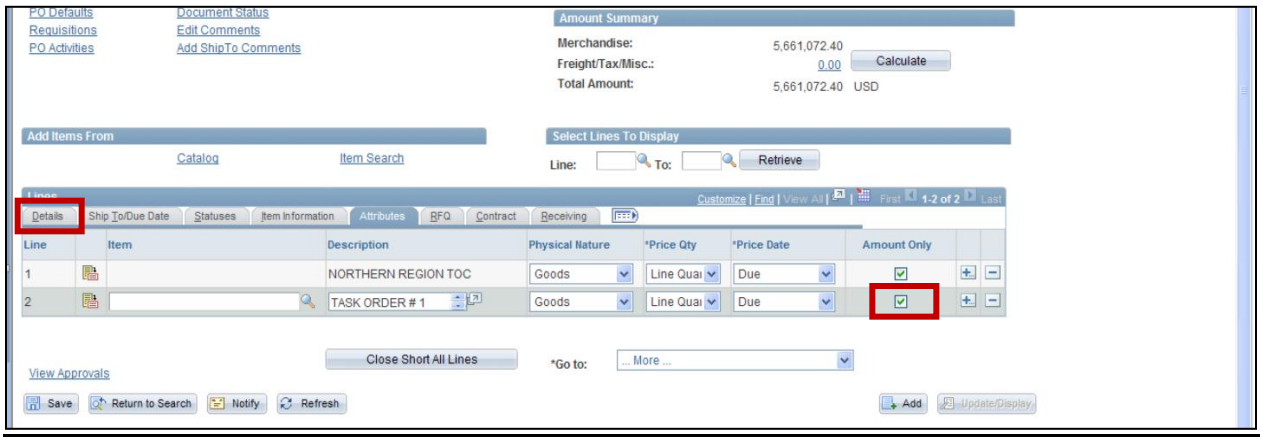



**72** Edit Description text to identify the Task Order.

**73** Insert the value of the Task Order.

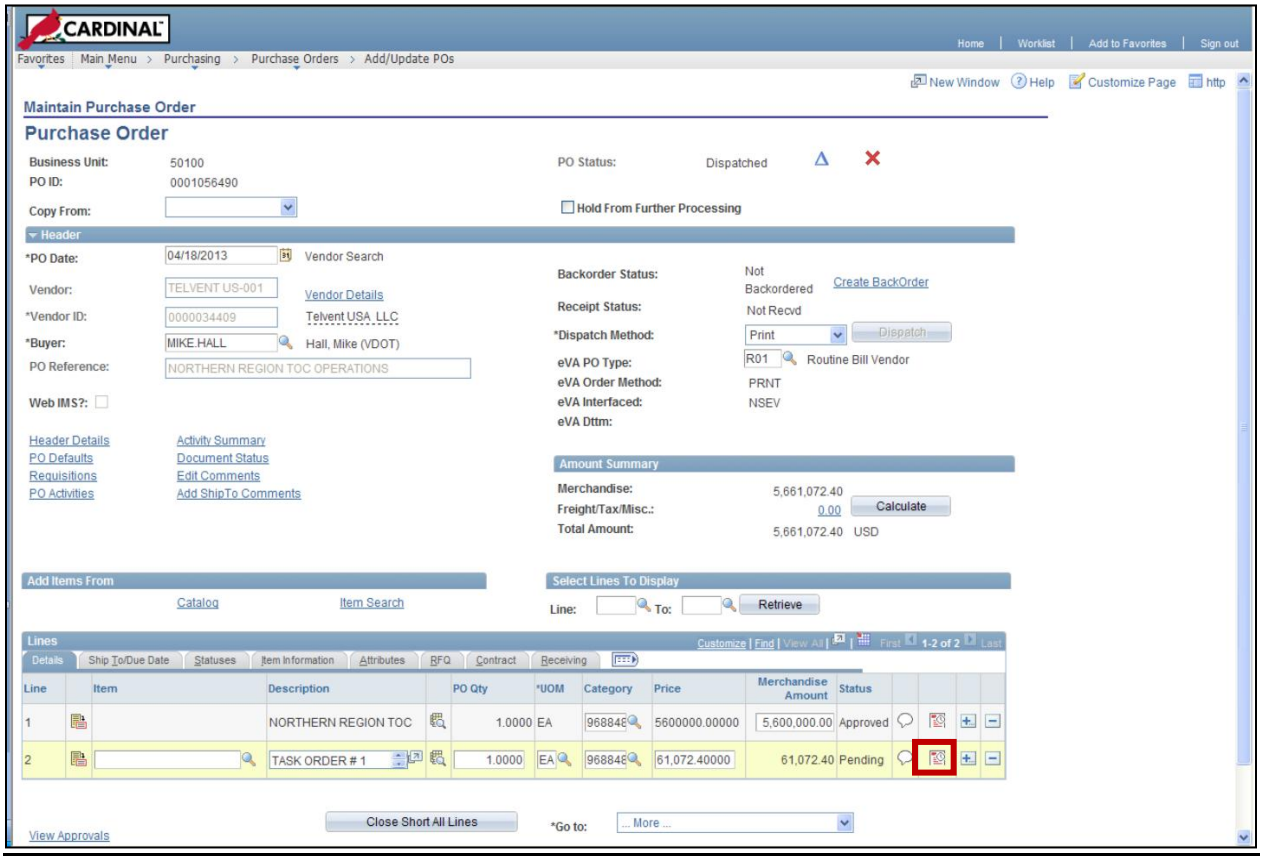
**74** Decrement line # 1 by the amount of the Task Order. **Note:** The sum of all lines shall always equal the original amount of the PO.

**75** Click the **Attributes** tab.

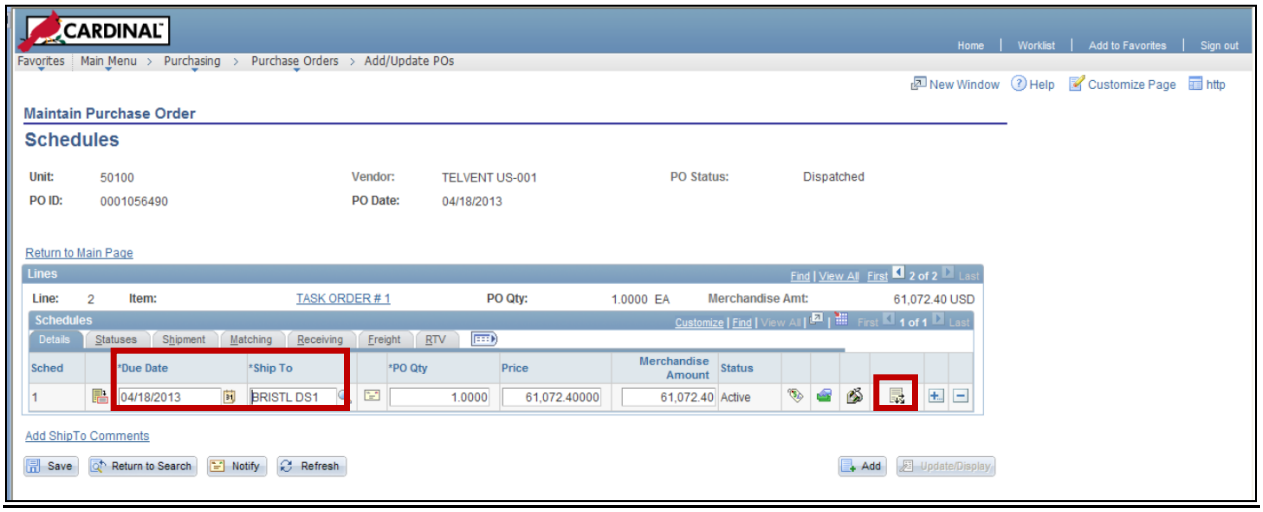



**76** Check the **Amount Only** checkbox.

**77** Click the **Details** tab.

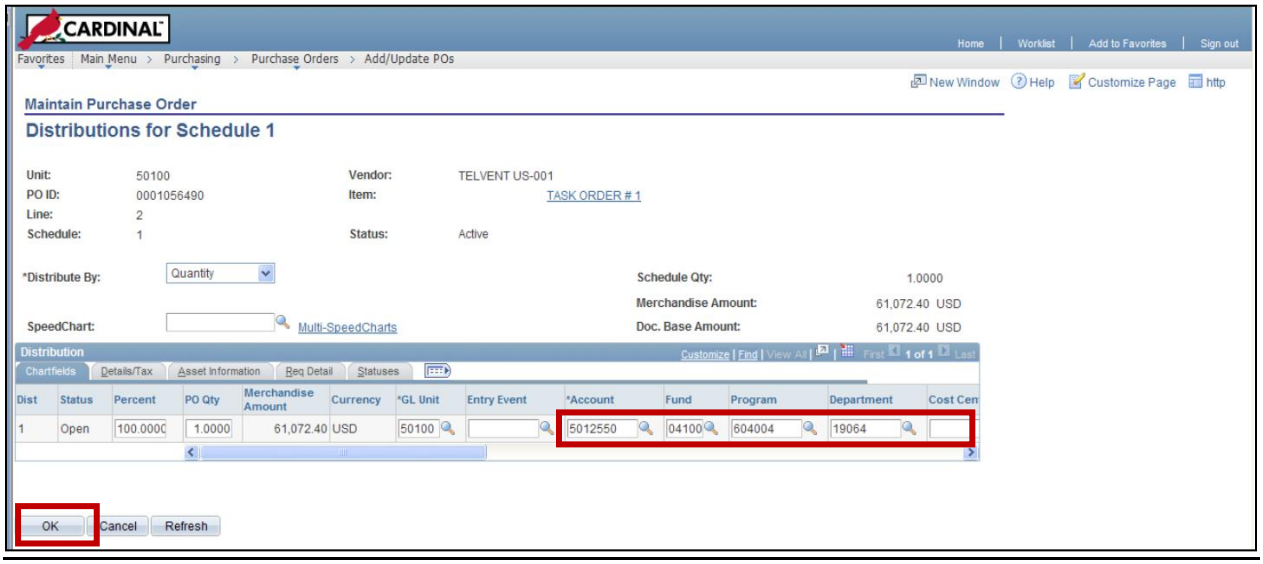



**78** Click the **Schedule** icon.



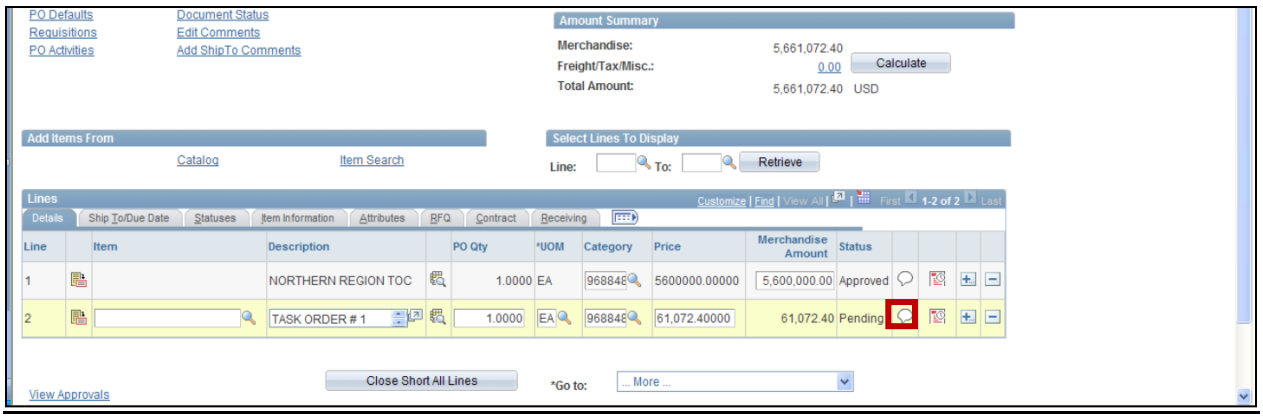

**79** Edit **Due Date** and **Ship To**, specific to this Task Order, if necessary.

**80** Click the **Distribution** icon.

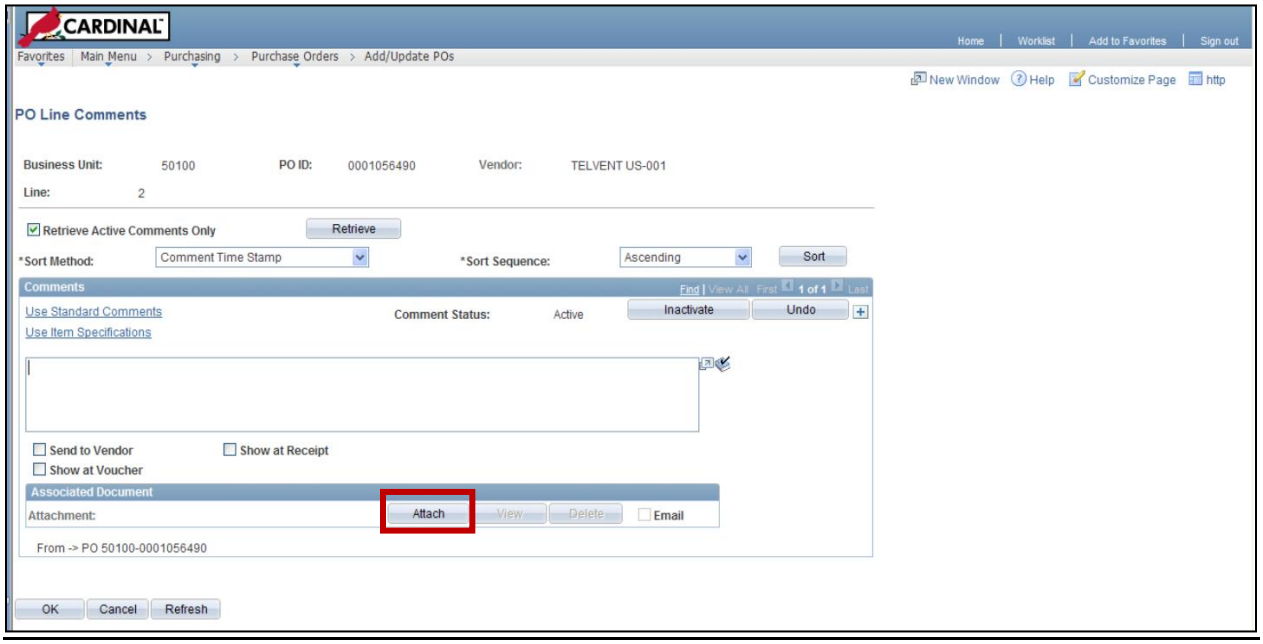



**81** Enter the Task Order project chart of accounts.

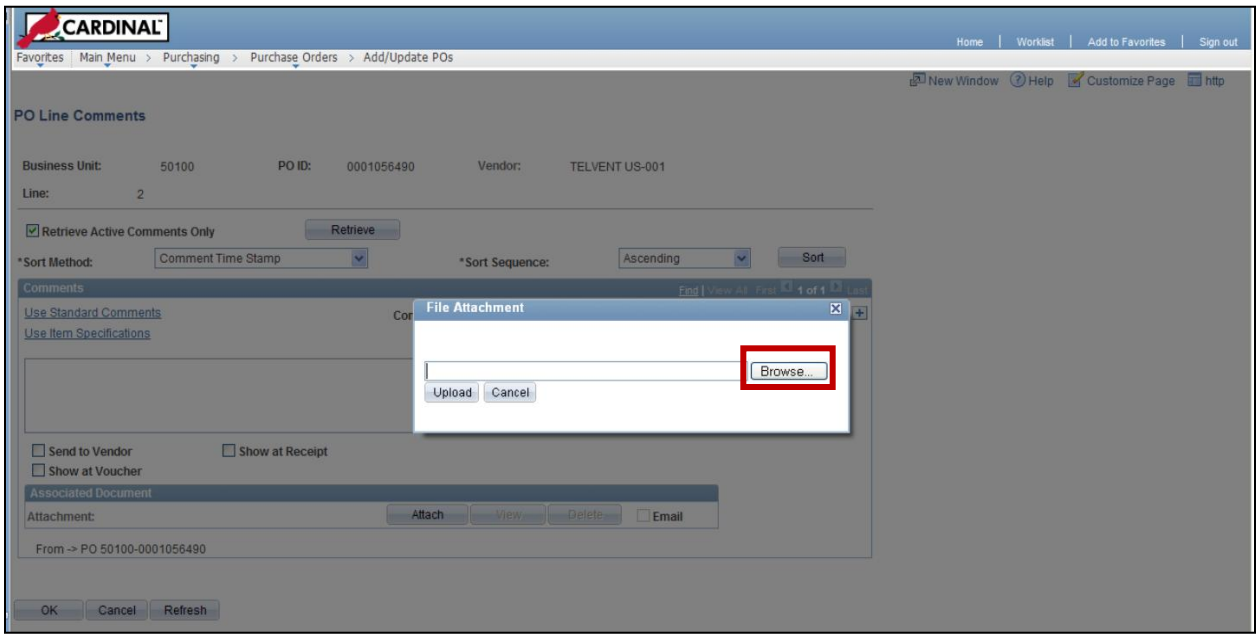
**82** Click **OK** and return to main page.



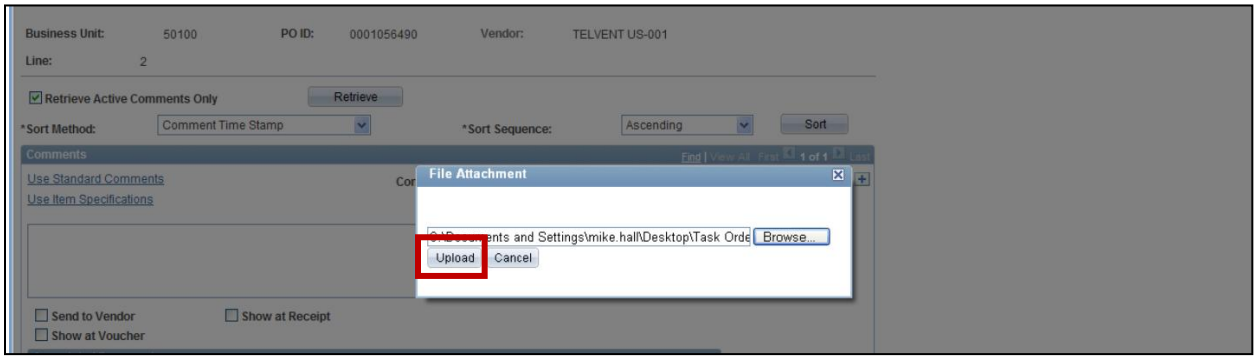

**83** Click the **Comments** icon.




**84** Click on the **Attach** button to insert Task Order related documents.

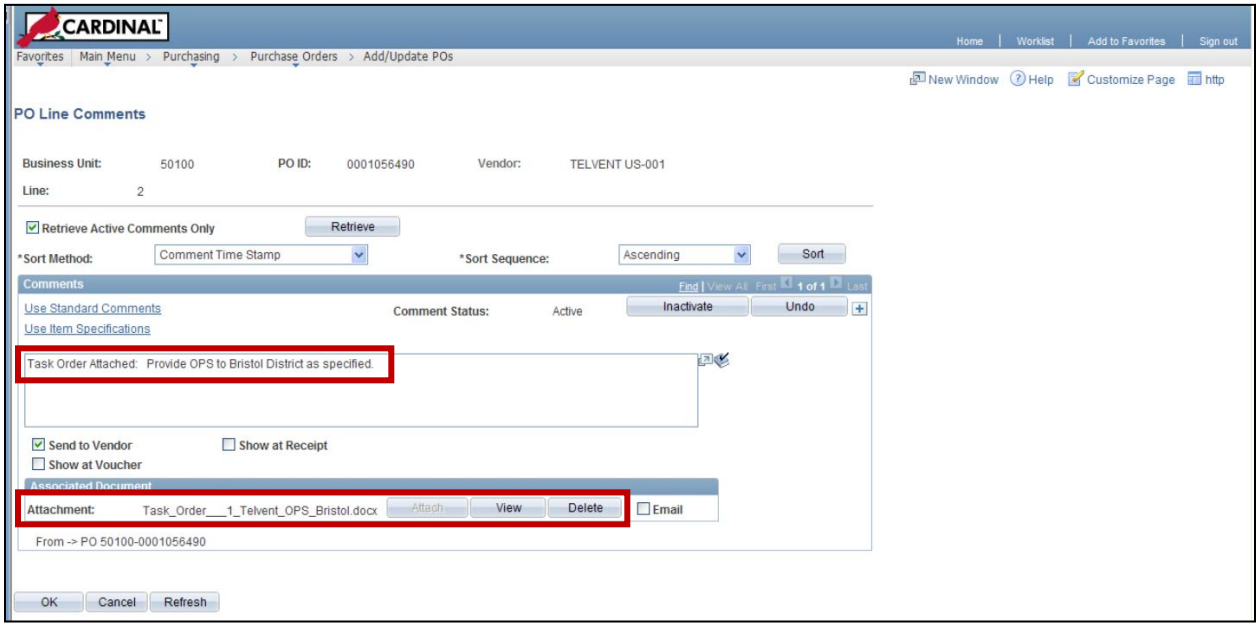



**85** Click on the **Browse** button.




**86** Select the related document from a file or desktop.

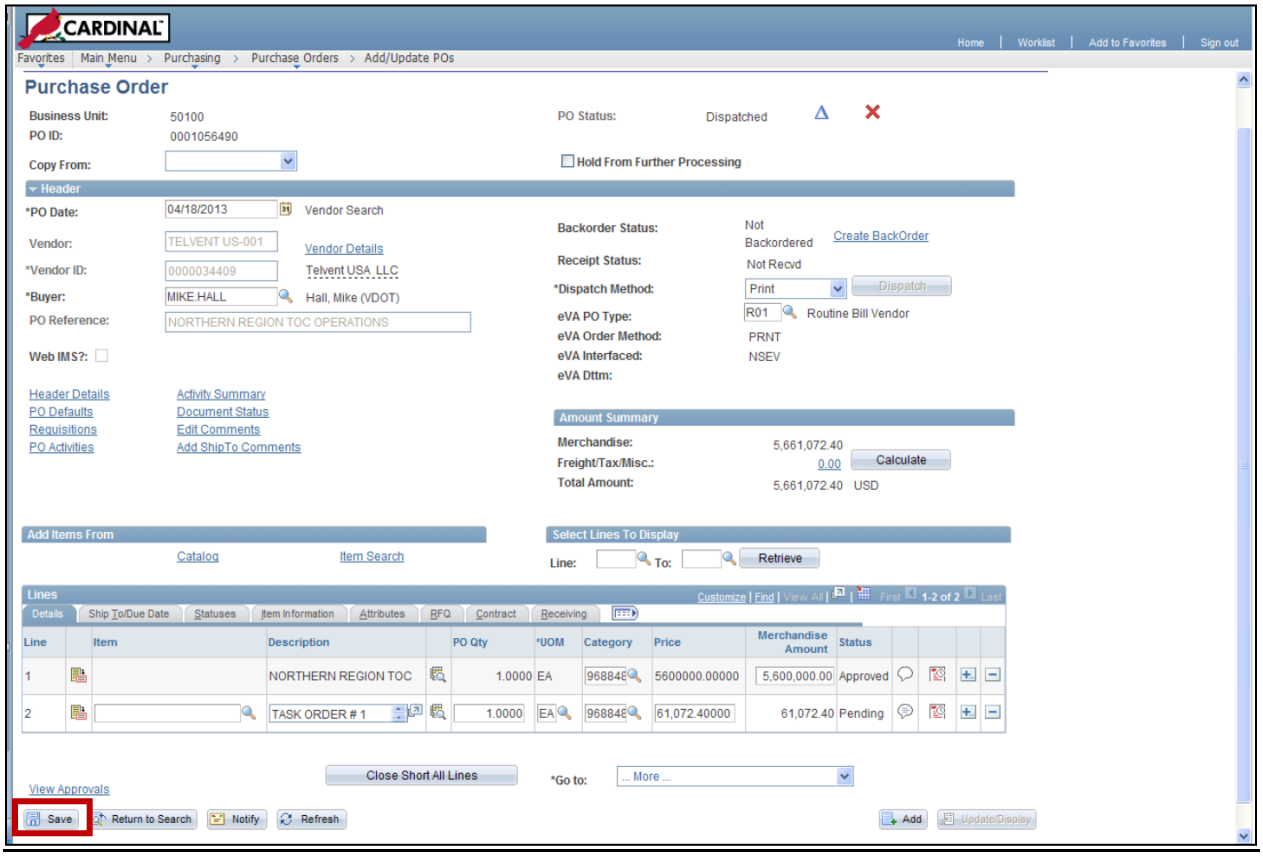
**87** Click Upload button.



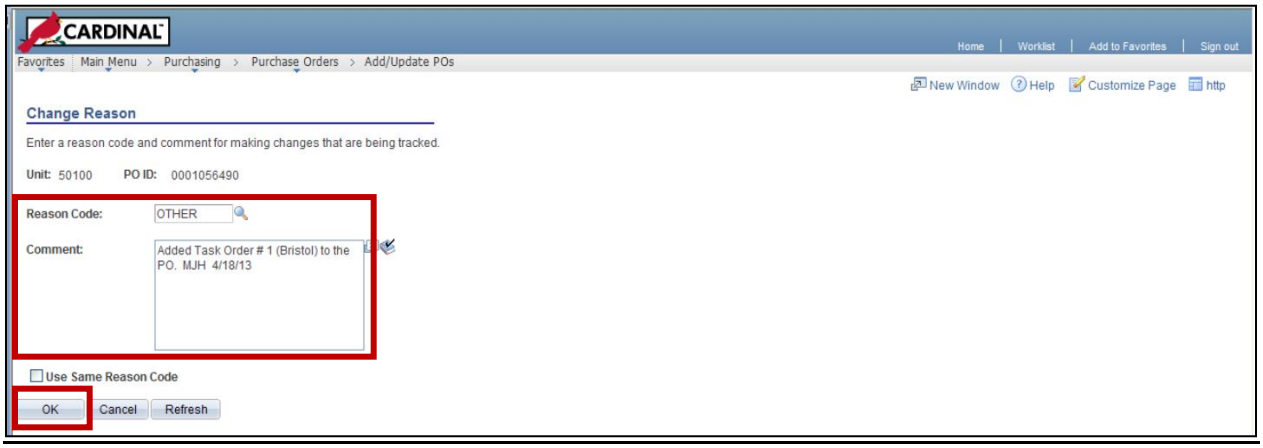

**88** Document is attached to Line # 2.

**89** Enter text comment.

**90** Click **OK**.

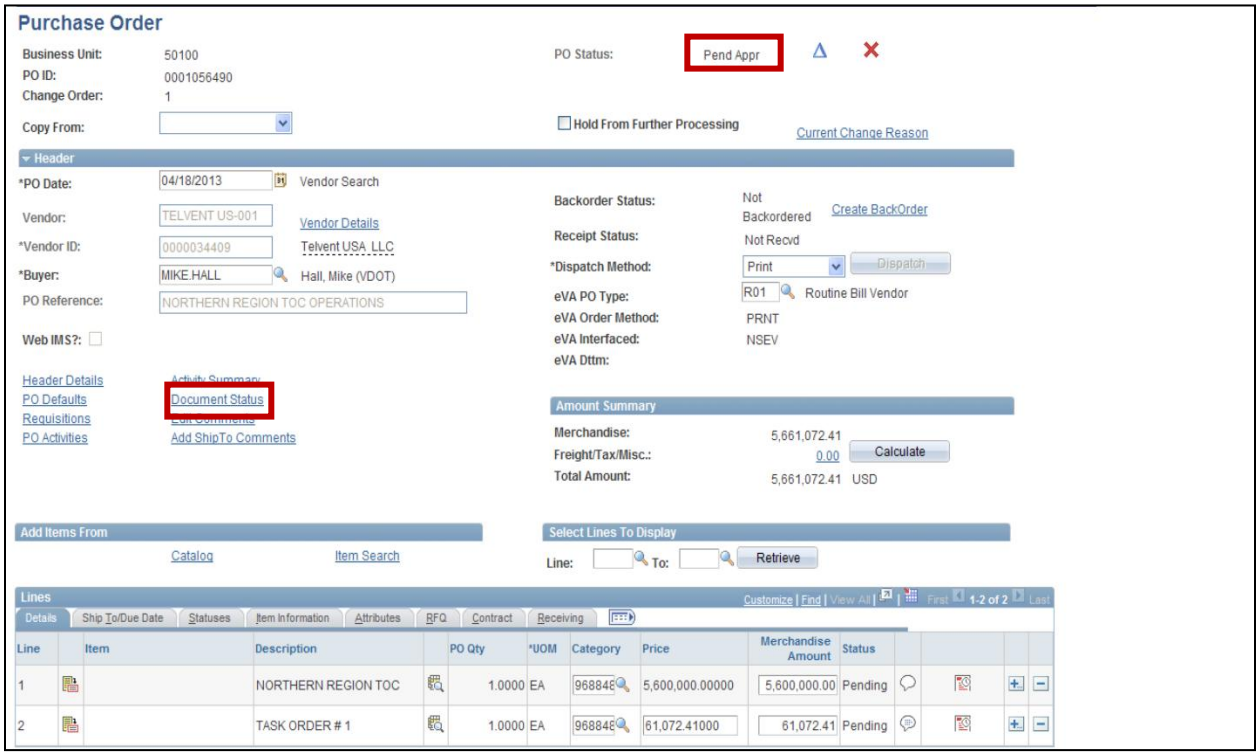



**91** Click **Save**.



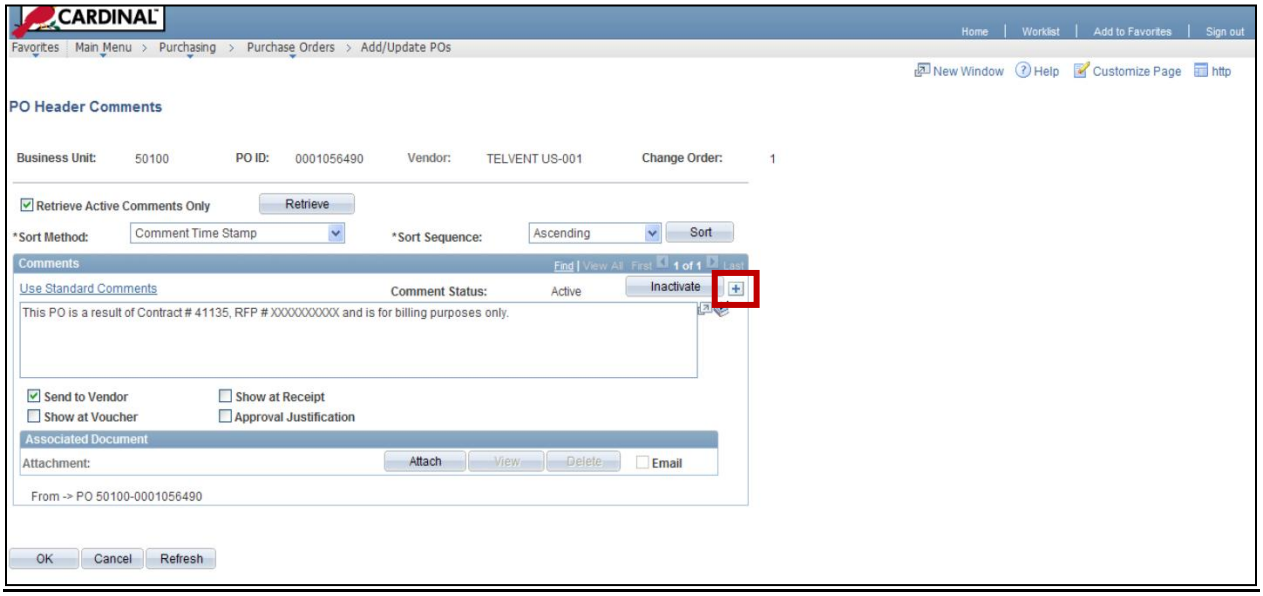

**92** Enter **Reason Code** and **Comment**.

**93** Click **OK**.



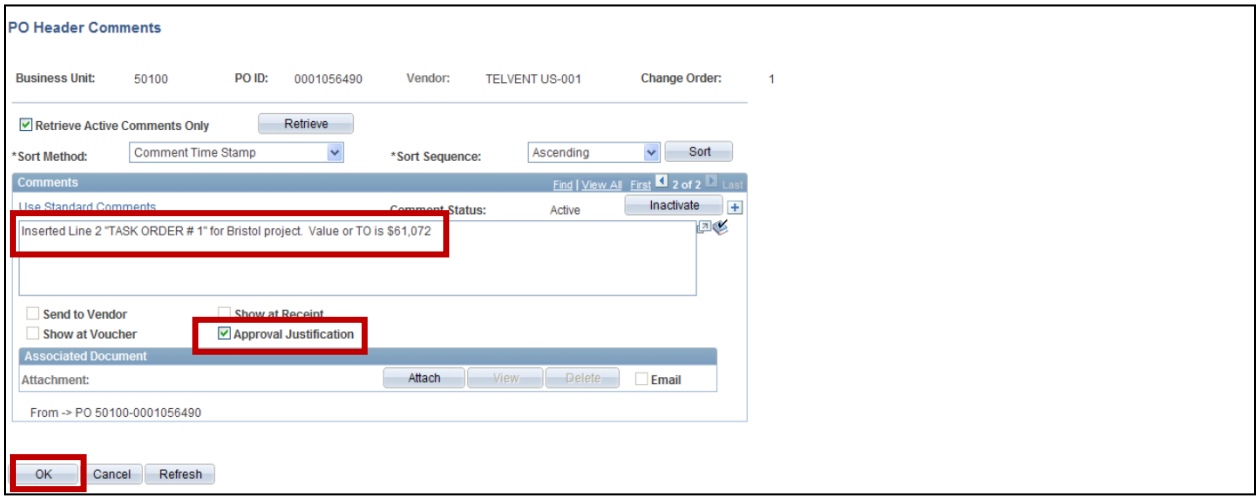

**94** Purchase Order changes to **Pending Approval**.

**95** Click on the **Edit Comments** icon.




**96** **PO Header Comment** is shown.

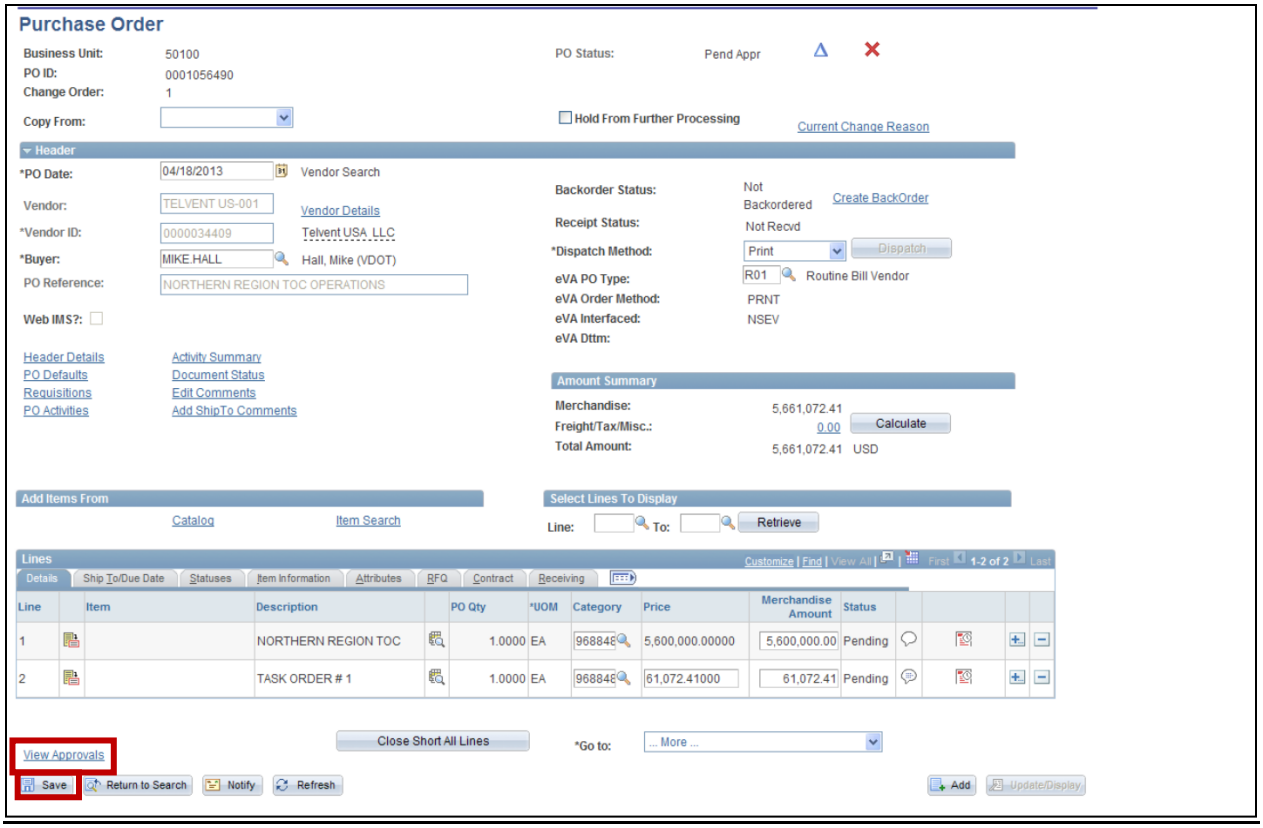
**97** Click on the **plus** box to add a comment.




**98** Enter comment(s) specific to this Task Oder # for approval justification.

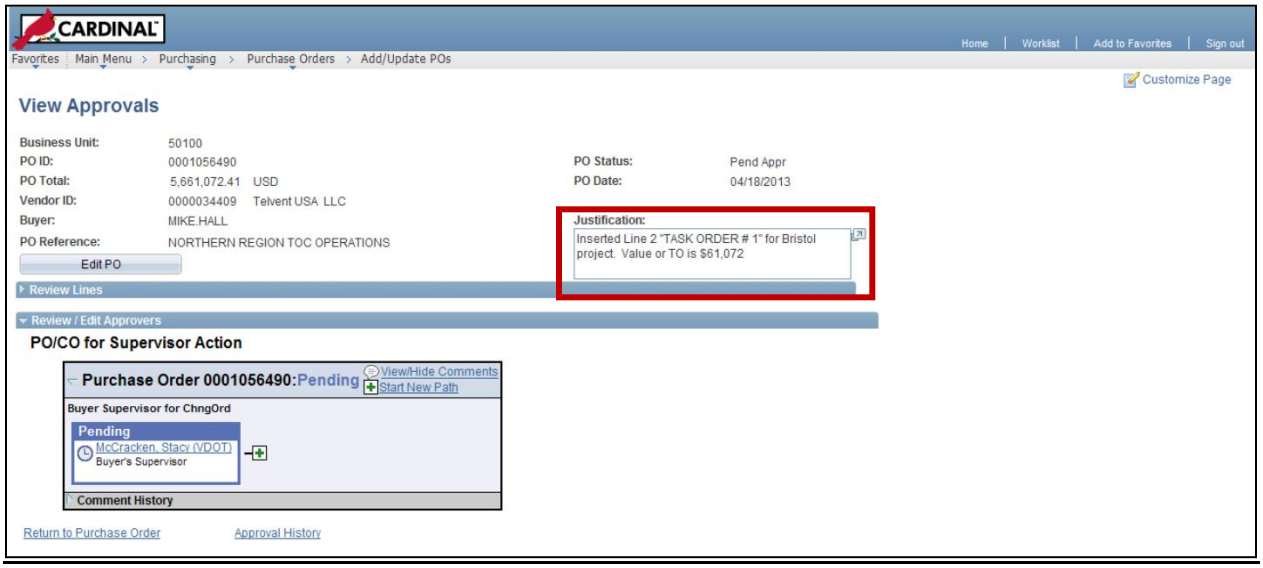
**99** Check **Approval Justification** checkbox.

**100** Click **OK.**




**101** Click **Save.**

**102** Click the **View Approvals** hyperlink.




**103** The **View Approval** page is shown. **Note: Justification** comment is displayed.

**104** The Supervisor is notified via email and the PO is on their worklist for action.

**Note: Approval is required by the Supervisor only. The total value of the PO does not change with the insertion of new lines, along with the decrement of line 1 for the value of each new line.**